OpenScape Xpressions V7 Web Client

User Guide

A31003-S2370-U105-2-7619

Our Quality and Environmental Management Systems are implemented according to the requirements of the ISO9001 and ISO14001 standards and are certified by an external certification company.

Reference No.: A31003-S2370-U105-2-7619

Harmonize your enterprise

unify.com

Contents

History of Changes

Date	Changes	Reason
2012-01-18	New note that points out restrictions on importing and exporting address book data. See Section 3.6.2.1, “Import”, on page 119 and Section 3.6.2.3, “Export”, on page 123.	CQ00194507
2012-04-25	Operation and settings of the DesktopIntegration updated. See Section 3.6.1.4, “DesktopIntegration”, on page 110.	CQ00207251

1 The *OpenScape Web Client* Communication Control

1.1 Preface

1.1.1 Content Chapter 1

This chapter contains information on the following topics:

1.1.2 Target Group of this Manual

This manual addresses the end user who deploys the *OpenScape Web Client* in connection with the Unified Communication solution *OpenScape Xpressions*.

Please note:

The user manual describes the *OpenScape Web Client* features in a comprehensive and detailed way. The described features are not completely available in every concrete use case. Their availability depends on the configuration performed by the administrator and the licenses you have purchased. Further restrictions on the availability may result from the communications system used and its software level as well from the deployed terminal devices.

1.1.3 What is the *OpenScape Web Client*?

The *OpenScape Web Client* is the client that allows using *OpenScape Xpressions* applications via the intranet.

The *OpenScape Web Client* is a fully developed presence management and communications control tool. With the *OpenScape Web Client* you can extensively handle and monitor your voice communication from your workstation. Coworkers whose job is very much dependent on information can use the *OpenScape Web Client* to manage their lines of communication and to access security-relevant company resources in realtime.

The main features of the *OpenScape Web Client* are:

- **Initiating and controlling calls**
  OpenScape Xpressions provides various features, for example to initiate calls, join a conference and monitor the operating states of your communication devices.
- **Scheduling and starting conferences**
  Conveniently starting meet-me conferences, starting and managing predefined conferences or scheduling future conferences.
- **Creating and maintaining contact lists**
  Administering contact data and checking whether a contact can also be reached via voicemail or e-mail.
- **Journal representation**
  All incoming and outgoing calls can be displayed in the **Journal (All Calls)** journal. This also considers calls that arrived during your absence since the information about these calls is centrally kept on the server. In addition, the phone numbers transmitted with incoming calls are matched to numbers contained in your contact list and, if present, the name of the caller is displayed.

OpenScape Xpressions

OpenScape Xpressions is a server solution for handling your entire communications. The available services can be used from your workstation, while being on the road or from home.

NOTE: The *OpenScape Xpressions* server can be installed with different features. The available features depend on the applications or combination of applications that have been installed in your company.

1.2 The *OpenScape Web Client*

The *OpenScape Web Client* is a server-based CTI solution for the intranet. The software is installed and configured centrally on the server. The user-related journal data and settings are also stored on the server. The client setup on the workstation otherwise required can thus be done without. This ensures a fast and simple spreading in the intranet. Even if the user PC is switched off, all journal information relevant to the user is maintained on the server and immediately available at the new login.

The user data is centrally saved on the server.

A web browser is sufficient for invoking the *OpenScape Web Client*. The *OpenScape Web Client* can thus immediately be used on any computer in the intranet.

The following browsers are supported for this application (on *Microsoft Windows* operating systems only):

- *Microsoft Internet Explorer* 6.0, 7.0 and 8.0
- *Firefox* 3.0.x and *Firefox* 3.5.x

1.3 Feature Overview

The *OpenScape Web Client* offers the following features:

- Telephony functions: e. g. dialing, hanging up, forwarding, alternating between, conferencing.

NOTE: Not all of the telephony features described here may be available. They depend on the PBX used and its software level, as well as on the terminal devices used.
The callback feature (in case of a busy line or unanswered call) is not supported with the *OpenScape Web Client*.
If multiline-compatible phones are used, the *OpenScape Web Client* supports the primary line only. See Section 1.3.1, “Multiline-compatible Telephones”, on page 12.
If you have questions, please consult your system administrator.

- Journal features: e. g. displaying, printing, deleting, configuring, filtered views.
- Security features: e. g. logging on, logging off, changing the password.
- Features of the contact list: e. g. adding, deleting, modifying and displaying entries; search and print function.

- Common address books: e. g. assigning access privileges, adding, deleting, modifying, and displaying entries; search and print feature.
- Rule interpreter features: e. g. defining, modifying and deleting rules as well as activating or deactivating rule profiles.
- Toggling different portal interface views:
  – The server pre-setting for the initial start is the so-called **compact view**. In this view you can reach all function windows via a combo box or tabs that appear under the caption bar.
  – Individually pre-defining five portal interface views that you can use alternatingly. This allows you to specify different window views that suit your special operating requirements.
- Hotkeys for operating your telephone and direct dialing of a selected phone number from any application via installing the Desktop Integration.
- Setting the user language via the web browser language settings. The current version supports the following languages: English, German, French, Spanish, Italian, Portuguese (Portugal), Portuguese (Brazil), Dutch, Turkish and Russian.

1.3.1 Multiline-compatible Telephones

The *OpenScape Web Client* does not offer the special features of multiline-compatible phones. A phone with at least two extensions, one main number (Primary Line) and at least one auxiliary number (Secondary Line) is called multiline-compatible. While each phone must have a main number, an auxiliary number is optional. You find the subscribers' main numbers usually in company directories, but not the auxiliary numbers.

An example: A spokesman of the managing board and his assistant have the main numbers 1000 respectively 1001, the latter also the auxiliary number 1000, so he can immediately pick up a call coming in for the extension 1000 – without the usual waiting period of some seconds. In addition, the assistant can use the number 1000 for telephoning, so that the callee cannot recognize that the assistant is calling and not the spokesman of the managing board.

Subscribers can unrestrictedly use main and auxiliary numbers to make and accept calls, but the *OpenScape Web Client* does neither display calls from an auxiliary extension on the screen nor are they logged in the journal. The *OpenScape Web Client* features merely cover calls with main numbers.

1.4 Working with this Manual

1.4.1 Reference Manuals

The following *OpenScape Xpressions* server documents are available:

Manual	Topic
OpenScape Xpressions Server Installation	*XPR* server setup instructions
OpenScape Xpressions Server Administration	Structure and configuration of the *XPR* server

_OpenScape Xpressions_Server Installation

The installation manual describes the linear installation of the *XPR* system as well as the subsequent installation of additional features and program components. Beyond that you are comprehensively informed about the installation and configuration of the communication hardware used. A corresponding guide supports a possible hardware conversion.

***OpenScape Xpressions* Server Administration**

This manual is for *OpenScape Xpressions* server administrators and describes in detail the product in its maximum configuration level. It informs you about the structure of the entire system and contains a description of the *OpenScape Xpressions* functions as well as of the available APLs. Here a detailed *OpenScape Xpressions* system configuration description is given.

1.4.2 Formats

To differentiate the types of information provided, the following conventions are used in this manual:

1. The single operating instruction steps are numbered.

- Enumerations are indicated with dots.

Italic	Product names appear *italicized*.
Font Courier	Examples of screen messages and responses that you make to input requests or entries in initialization files are printed in `Courier`.
Boldface	Names of dialog titles, dialog texts, and operating elements (buttons, check boxes, tab names) are in bold lettering, for example: **Logging Options** or **Finish**.
<*User Name*>	Variables are indicated by the italicized variable name appearing in pointed brackets. For example <*Variable*>.

In the manual on hand the following notes are used:

NOTE: Indicates useful notes.

IMPORTANT: Text indicated in this way signalizes high priority information. The corresponding notes must be heeded to avoid damages to the system or loss of data.

Figures

In this manual all entry dialogs important for the operation and configuration are represented; depending on the operating system (Windows Vista - Business and Enterprise - or Windows XP Professional), the browser used, the screen resolution and PC configuration, the appearance of the dialogs may slightly vary.

2 General Information

2.1 Supported Web Browsers

The *OpenScape Web Client* is exclusively supported on *Microsoft Windows* operating systems by the following web browsers:

- *Microsoft Internet Explorer*
- *Firefox*

NOTE: You find current information about the supported versions of the released web browsers in the “*OpenScape Xpressions Release Notice*” manual.

2.2 Setting Languages via Web Browser

You set the user language in the web browser's language configuration. The current version supports the following languages:
German, English, French, Italian, Dutch, Portuguese (Portugal), Portuguese (Brazil), Russian, Spanish, and Turkish.

2.3 Restrictions on using the *OpenScape Web Client*

2.3.1 Multi-Sessions

The *OpenScape Web Client* does not support multi-sessions. In other words, you cannot open several browser sessions for the same user.

2.3.2 “Request callback when busy” Feature triggered via Telephone

The **Request callback when busy** feature is currently not supported in the *OpenScape Web Client*. If you trigger this feature via telephone, the return call is signalled in the *OpenScape Web Client* but cannot be accepted via the **Call Control**.

2.4 Communicating with Contacts

In an *Xpressions* environment the *OpenScape Web Client* facilitates communicating with your contacts.

2.4.1 Reaching a Contact by Telephone or E-mail

The icons to the right of a contact's name in the contacts window show you whether that person can be reached by phone or e-mail:

- A blue telephone icon for calling the contact.
  A click on this icon either initiates a direct call to this contact or opens a list from which you can select a phone number for reaching the contact.
- The e-mail icon is always available if an e-mail address has been configured for the contact.
  A click on the icon opens the e-mail send form of the e-mail program you use by default.

This information is also available as quick info (tool tip) when the cursor is positioned on the icon.

2.4.2 One-Number Service

The *One-Number Service* feature enables the user to combine mobility, optimal availability and transparency towards third parties.

NOTE: This feature can only be used if an *OpenScape Voice* PBX is an element of the system.

Via the outbound *One-number service* you define the device to be preferred for outgoing calls that you initiate with the help of the *OpenScape Web Client*. The callee always sees the defined number on his/her display.

The inbound *One-Number Service* enables the direct rerouting/forwarding of a call to a definable target. Such a target may be a cell phone or the voicemail box. That means, a caller always sees the number he/she has dialed on his/her phone display and not the number of the device on which the call was actually accepted.

Using the *One-Number Service* feature requires the following settings:

1. Add devices that can be used for reaching you (cell phone, voicemail number etc.) to the device list. See Section 3.6.1.3, “Forwarding”, on page 107.

2. Activate the feature under **menu > General > Common > Forwarding > Preferred device**. There you can select the desired *One-Number Service* device for incoming and outgoing calls. See Section 3.6.1.3, “Forwarding”, on page 107.

   NOTE: If you have added your voicemail box number to your device list for using the voicemail box as redirection target, do not configure this number as preferred device for the outbound *one-number service*. The reason is that you cannot make any calls from your voicemail box. The XPR server cannot recognize phone numbers you have added yourself as unsuitable for making calls.

NOTE: In the *OpenScape Web Client* caption bar you can quickly select a device for making calls using the *one-number service*. In addition, you can invoke the Forwarding settings dialog there.

2.5 Collaborating with others Persons

2.5.1 Telephony Features

You can immediately set up a phone connection to the respectively displayed subscribers from contact lists, call journals or search result lists.

Each contact has been assigned a handset icon to directly initiate a call to this contact.

NOTE: You can initiate a call via these icons if you have already established a connection, to hold e.g. a consultation call or initiate a conference.

With a click on the appropriate icon in the contact list windows or in a search-hit list, you can trigger the following:

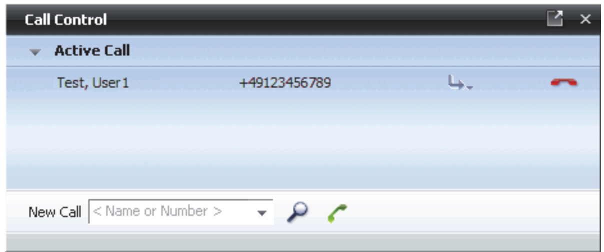
Call
Initiates a call to this subscriber.

Several numbers available
Initiates a call to this subscriber, but you first need to select a phone number from the list of phone numbers available for this subscriber.

NOTE: The small triangle icon is only visible if several phone numbers are present for the contact in the contact list, for example the workstation telephone and mobile phone. It also becomes visible when the call has been rerouted. A click on the icon expands the journal entry and all phone numbers present for this contact are displayed. Click on a list entry to call the subscriber under this number.

2.5.1.1 Call Control

The **Call Control** dialog always opens automatically when you set up a call connection or another subscriber tries to reach your extension. It provides the control features for operating your telephone:



In case of outgoing or incoming calls this dialog displays information about the connection status:

- The phone number of the calling (if known) or called subscriber.
- If available in the XPR database or entered as external contact name, the name of the calling or called subscriber.
- The icons for controlling the connection.
  The following sections describe the meaning of the icons.

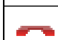
NOTE: When a phone connection has been set up, the user name of the currently talking subscriber is bolded. This enables the identification of the respective speaker during a conference.

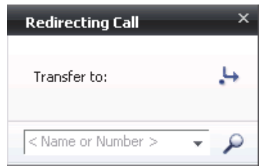
Incoming call

When a call comes in, the **Call Control** dialog opens automatically.

NOTE: Depending on your configuration settings the dialog can be displayed in the foreground of all running applications. See **Pop up on incoming call** in Section 3.6.1.1, “Appearance”, on page 102.

You can use the following features in the **Call Control** dialog for inbound calls:

Icon	Explanation
	**Accept call** When you click on this icon the call connection for an incoming call is set up.
	**Reject call** When you click on this icon the call is rejected and the attempt to set up a connection aborted.

Icon	Explanation
	Transfer call You can use this feature to transfer calls to another device an answer them there. A click on this icon opens the **Redirecting call** dialog.  Using the **Transfer to** icon you can forward the call to another subscriber. You can transfer a call in two ways: – By entering a name or phone number in the input line. – By selecting a contact via the search feature . After a subscriber has transferred a call, his/her call control is closed.
	Set active call to "on hold" This feature interrupts the voice transmission of an active call. The actual phone connection is still maintained. You can use this feature to consult on a colleague without the waiting conversational partner being able to overhear this.
	Pick up waiting call You use this feature to resume the call set to "on hold".

Outgoing call

Via the **New Call** combo box you can establish a new phone connection by entering a number or name.

1. Open the **Call Control** window for an outgoing call.
2. Enter a phone number in the **New Call** combo box for this purpose. You can also click the triangle icon on the right margin of the **New Call** combo box to select an entry from the list of the last 20 calls or to find the desired subscriber via the search function .

3. Click on the icon to initiate the call.

   After you have set up the connection you can use the following features to control the call:

Icon	Explanation
	Close connection When you click this icon the call ends.

Establishing and controlling a consultation call

A consultation call allows setting up another connection during an existing one (consulting on a subscriber). The original connection is being held. When the consultation has been finished, the original connection is active again.

1. Enter the phone number of the subscriber who you want to consult in the **New Call** combo box. You can also click the triangle icon on the right margin of the **New Call** combo box to select an entry from the list of the last 20 calls or to find the desired subscriber via the search function .

   NOTE: You can use wildcards (*) in every search criterion.

2. Click on the icon to initiate the call.

   After you have set up the connection you can use the following features to control the call:

Icon	Explanation
In the top section of the call control, the held initial call	
	Transfer to new subscriber With a click on this icon the held call is transferred to the consultation-call subscriber. Your connection is then automatically cleared.
	Pick up waiting call When you click this icon the connection to the consultation-call subscriber is cleared. You are automatically reconnected to the original caller.
	Switch connection When you click this icon the connection to the original caller is set up again. The connection to the consultation-call subscriber is held. You can toggle the two conversational partners by repeatedly clicking this icon.
	Start conference A click on this icon initiates a conference between the subscribers. The caller, the callee and the consultation-call subscriber are then connected to each other. ***Note:*** This type of conference is only possible when you set your office phone as preferred device. In other words, the PBX cannot connect the conference participants if another extension is used as preferred device for the *one-number service*.

Icon	Explanation
	Close connection When you click this icon the call ends.
In the bottom section of the call control, the active consultation call	
	**Pick up waiting call** When you click this icon the connection to the consultation-call subscriber is cleared. You are automatically reconnected to the original caller.
	Close connection When you click this icon the call ends.

Controlling a conference connection

Conferences are always set up from active calls as is described above under Setting up a Consultation Call. In this way you can gradually add further subscribers to the conference.

The connection control provides the following features for controlling a conference:

Icon	Explanation
In the header	
	**Lock conference** After you have clicked this icon, other potential conference participants cannot log on to the conference anymore. The icon changes to a closed padlock after you have clicked it.
	**Unlock conference** Clicking this icon unlocks the conference again.
	**Mute conference** Sound transmission to all conference participants is interrupted. After you have clicked this icon it turns gray and is crossed out.
	**Cancel conference muting** A click on this icon cancels the conference muting.
	**End conference** Ends the conference by closing down the connections to the conference participants.
During the connection representation of the conference participants	
	**Mute participant** Sound transmission to a specific conference participant is interrupted. After you have clicked this icon it turns gray and is crossed out.
	**Cancel muting a participant** A click on this icon cancels muting a conference participant.
	**Leave conference or remove participant from conference** This feature enables you to leave the conference or to remove other conference participants from the conference.

2.5.2 Conferences

Besides the conferences that you can set up from an active call via the call control, the *OpenScape Web Client* provides further options to configure and start scheduled conferences (Meet Me conferences).

Meet-me or scheduled conferences are ideal for recurrent conferences that are to be scheduled beforehand but need not be started by a moderator. You configure this type of a scheduled conference via the **Conferences** dialog. The conference starts as soon as the first conference participant has dialed into the conference.

2.5.2.1 Configuring and starting scheduled Conferences

Configuring voice conferences

Via the **Create new conference** icon you can configure a scheduled conference with any participants you would like e.g. to call regularly. You reach this icon via the following windows:

- **Conferences**
- **Contacts**
- **Contacts (compact)**

How to configure a scheduled conference:

1. Click on the **Create new conference** icon. The **Conferences** dialog for defining the conference opens.

   In the **Conferences** dialog the following elements are displayed and can be edited if required:

   - A combo box for selecting and editing an already existing conference.
   - The **Create new conference** icon. This icon lets you create a new conference also in case you have opened this dialog for editing an existing conference.
   - **Name**:
     Name of the conference.
   - **Creator**:
     Name of the conference creator
   - **Start time**:
     Select the checkbox next to Start time if the conference is to start at a specific time. An entry field appears in which you can set the date and time for the conference start and in another entry field you can specify the conference duration. Click in these fields to make the appropriate definitions.
   - A list of the conference participants with the following information:
     – Display of the conference participant's phone number.
     – Edit icon to adjust the address data.
     – Deletion icon to remove conference participants from the list.

2. Add the participants you would like to invite for the conference to the list of conference participants. Use the following functions:
   – Adding a participant via the combo box of the last dialed numbers.
   – Adding a participant via the search function .
   – Adding a participant by manually specifying participant data .
3. If you wish to prepare the voice conference for a web conference in addition, select the service provider for the web conference in the **Web conference** combo box. The call control then provides additionally the icon for starting the web conference in the started voice conference.

   NOTE: You find information about the web conference client in the operating instructions for the *OpenScape Web Collaboration* product.

   ---

4. Start the conference by clicking the **Start** button.

   or

5. Click on **OK** to save the conference. The conference appears as entry in your conference journal and in the conference journals of the invited participants. At the same time, an e-mail is sent to all conference participants that contains the required dial-in data.

   You can now start or join the conference by clicking on the icon and selecting **Join Conference** from the thus opened list.

After the conference start the conference icon color changes from green to yellow .

With the conference start or with joining the conference, the **Call Control** dialog opens. This dialog enables monitoring and controlling the conference. See Section 2.5.1.1, “Call Control”, on page 19.

2.5.3 Team View (optional)

The **Team View** offers useful features for making calls within a team. You can see the team partners' telephone statuses and, depending on privileges, you can accept calls, forward them as well as access the team partners' journals (all calls). You find details about configuring the Team View in Section 3.5.3, “Team View (optional)”, on page 65.

The **Team View** shows the members of your team. It also provides the following team features depending on the assigned privileges:

- Monitoring the team partner's phones.
- Calling team partners.
- Picking up calls for team partners.
- Accessing the journal entries (all calls) of a team partner

2.5.4 Working with Address Books

Address books allow using the *OpenScape Web Client* conveniently. You can initiate calls from an address book without having to enter the phone number of the desired conversation partner. This is efficient communication.

2.5.4.1 Types of Address Books

The *OpenScape Web Client* lets you use various types of address books. Depending on the configuration, the following are available:

- Personal address book (contact lists, default short-dial list or the Microsoft Outlook contact directory)
- One or several shared address books
- One or several global address books

You use all of these address books in the same way. The controls are identical. Merely the functions may be restricted by privileges.

Personal address book

Every user of the *OpenScape Web Client* has a personal address book with write and read privileges, which only he/she can access. This address book may be the short-dial list of the *OpenScape Web Client* or the Microsoft Outlook contact directory. If configured by the administrator, you can select one of these two address books for yourself.

Shared address books (optional)

Every *OpenScape Web Client* user can create shared address books that can be used by a group of selected coworkers. It is then for the group to decide who may use them and which privileges apply. For example, only a read privileges or the full access privilege can be granted.

Shared address books can be used completely independently from already existing telephony teams, for example the **Team View** feature. You find details about configuring shared address books in Section 3.5.11, “Shared Address Books (optional)”, on page 89.

Global address books

Global address books are created and provided by the administrator. They are available to every *OpenScape Web Client* user. The user can only read a global address book, thus he/she cannot make any modifications. Examples of such address books are corporate directories, the data of all coworkers (addresses, department names, phone numbers, e-mail addresses etc.).

2.5.4.2 Contacts, Contacts (compact) and Short-dial List

You manage and use your contact entries via these function windows. When you add a contact to one of these contact lists, he/she is automatically displayed in the other contact lists. You can configure and use your preferred contacts via the following function windows:

Contacts

If you need comprehensive information and controls you select this detailed representation of your contact entries. Here you find the additional entries **Department** and **Company** for each contact.

Via a letter menu you skip to the first entry that begins with the selected letter. Furthermore, you can filter the entries according to categories. If, for example, you have combined all private entries in the “Family” category, you can display them exclusively. This function window contains the **Go to** search function in addition. This function allows quickly finding and selecting a contact entry by specifying a contact name or its initial.

Contacts (compact)

If you prefer a concise representation of your contact data, you can use this function window. It contains the names and phone numbers of your contacts.

Via a letter menu you skip to the first entry that begins with the selected letter. Furthermore, you can filter the entries according to categories. If, for example, you have combined all private entries in the “Family” category, you can display them exclusively.

Short-dial list ("All Address Books" function window)

The **Short-dial list** screen in the **All Address Books** function window shows the same contact entries that the **Contacts** and **Contacts (compact)** function windows display.

The operating options in this function window differ from the features of the **Contacts (compact)** window only in additionally providing access to the shared address books. Open the combo box in the caption bar with a click on the small triangle next to the window caption. Then select the address book you wish to open from the list.

2.5.4.3 Shared Address Books (optional)

Every *OpenScape Web Client* user can create shared address books that can be used by a group of selected coworkers. It is then for the group to decide who may use them and which privileges apply. Shared address books can be used completely independently from already existing telephony teams, for example the **Team View**.

You use these address books, the contact windows and the short-dial list in the same way.

To open a shared address book, click on the small triangle next to the combo box in the caption bar. Then select the address book you wish to open from the list. Section 3.5.11, "Shared Address Books (optional)", on page 89 describes how to configure shared address books.

2.5.4.4 Importing and exporting Address Data

If you wish to integrate larger amounts of address data in your short-dial list or shared address books, use the data import feature of the *OpenScape Web Client*. Entering such data manually would consume much more time. In addition, you can use the data export feature to back up the address data of the short-dial list or a shared address book and make it available to other *OpenScape Web Client* users. In Section 3.6.2.1, "Import", on page 119 and Section 3.6.2.3, "Export", on page 123 you learn how to export and import data.

2.5.5 Working with Address Groups

Address groups enable the structuring of the contact list content to provide a clear overview. You can assign an attribute to a contact entry, which labels the contact as member of a group you have specified. For example, you can group your contacts according to company membership, departments or as private. Via the contact list you can then selectively access these groups. You find details about using, configuring and editing address groups in Section 3.5.9.4, "Working with

Address Groups", on page 86.

2.5.6 Voicemail Playback (optional)

If your *OpenScape* system is extended by a *voice server*, voicemails that have been created via the *OpenScape Voiceportal* or are received via a call diversion are stored in your voicemail box and displayed.

In the journal of your voicemail inbox, the voicemails are labeled by the following status icons:

Voicemail not played yet

Voicemail played

NOTE: When you click on the **voicemail not played yet** icon, the voicemail's status changes to **voicemail played**.

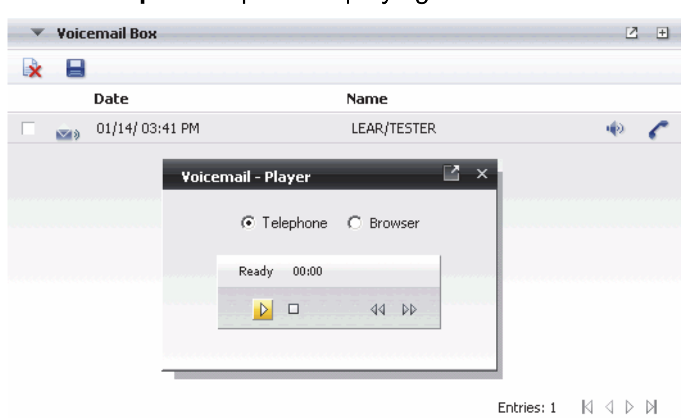
The voicemail is played back via telephone by default. If you want to play the voicemail via the *Windows Media Player*, set the **Browser** option in the playback control.

NOTE: The computer on which the voicemail is to be played by the *Windows Media Player* must have the respective audio equipment (sound card, loudspeaker etc,) so that you can listen to the voicemail.

2.5.6.1 Playback via Telephone

How to play a voicemail via telephone:

1. Select the journal entry of the voicemail you want to play.
2. Push the icon to start the playback. The playback control is opened with the set **telephone** option for playing the voicemail via telephone.



On top of operating elements of the playback control you find a status bar that displays the current playback status. After a short initialization period (connection is set up) the status bar displays **Ready**. You can now start the voicemail playback.

3. The following features are available to play back the voicemail via telephone:

Icon	Explanation
	Start/continue playback After a click on this icon your telephone rings. After having picked up the receiver the playback of the voicemail starts immediately.
	Pause playback The voicemail playback is paused. The **Pause playback** icon changes to the **Resume playback** icon. Clicking this icon restarts the playback after a pause.
	Stop playback When you click this icon the playback is stopped and reset to the start.
	Rewind Click this icon if you want to rewind the message for listening to a passage again.
	Fast forward Enable this icon if you want to fast forward the message to skip some passages.

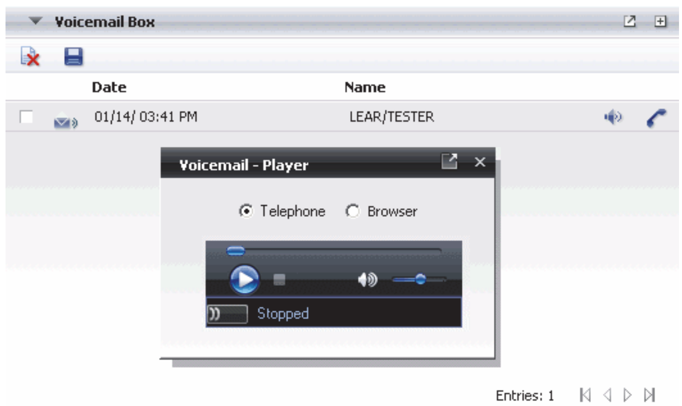
2.5.6.2 Playback via the *Windows Media Player*

How to play back the voicemail via the *Windows Media Player*:

1. Select the journal entry of the voicemail you want to play.

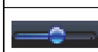
2. Push the  icon to start the playback. The playback control is opened with the set **telephone** option for playing the voicemail via telephone.

3. Set the playback option to **Browser**. The *Windows Media Player* play control is displayed.



   Above the play control operating items you will find a progress bar that indicates the rough position during the voicemail playback. Under the operating elements you find a status bar that displays the current playback status. After a short initialization period (connection is set up) the status bar displays **Ready**. You can now start the voicemail playback.

4. You can now use the following operating elements for playback via the *Windows Media Player*:

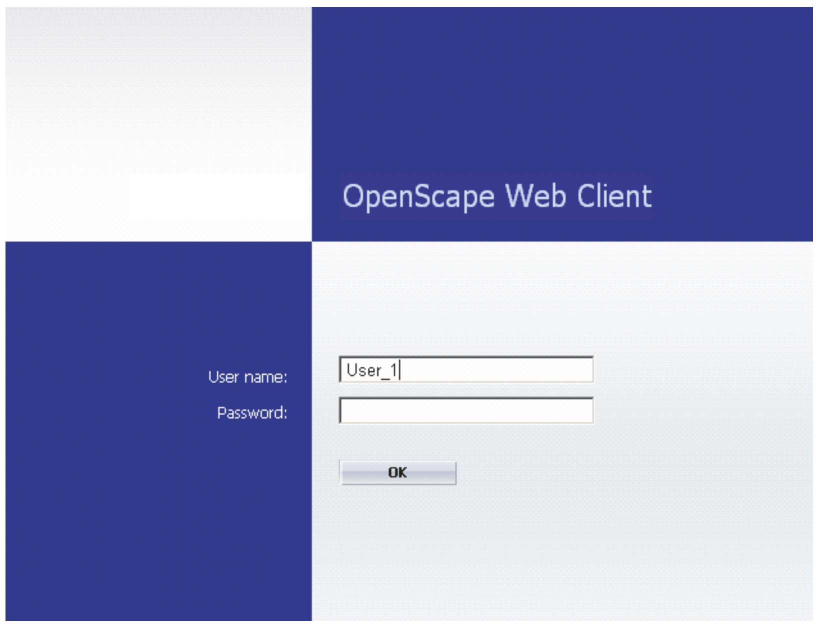
Icon	Explanation
	**Start playback** After you have clicked this icon, the voicemail is immediately played via the speakers attached to your PC or via headset. After a click on this icon the icon changes to **Pause playback**.
	**Pause playback** A click on this icon stops the playback at the current spot. After a click on this icon the icon changes to **Start playback**. Thus you can continue the playback.
	**Stop playback** When you click this icon the playback is stopped and reset to the start.
	**Mute** Click this icon to turn off the sound.
	**Set volume** Moving the slider with the mouse you can increase or decrease the volume.

3 Operating the *OpenScape Web Client*

3.1 Logging on

How to log on to the system with the *OpenScape Web Client*:

1. Start your web browser.
2. Enter the URL of the *OpenScape Web Client* in the address input field and push the enter key. The system administrator will inform you about this address.
   The login dialog is displayed.



3. In this dialog specify your user name under **User name**.
4. Also enter your password in the **Password** field.
5. Finally, finish with **OK**.
   The *OpenScape Web Client* interface opens.

NOTE: The administrator will inform you about the user name and password.

3.2 User Interface

3.2.1 Overview

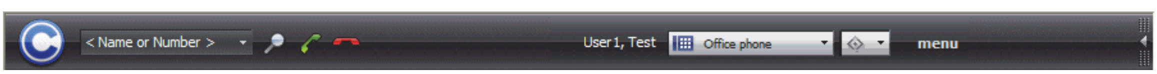
When you open the *OpenScape Web Client* for the first time, you see the client interface in a defaulted structure in the compact view:

> ***NOTE:*** The display option **Select start option** > **Large View** lets you simultaneously integrate several of the available function windows in the work area at a later date.

- An unchangeable caption bar found at the top margin of the application. It contains the main menu of the *OpenScape Web Client*.
- The bar for selecting tabs, which is a compact view feature. It enables selecting the desired function window.
- The work area under the tab bar, which displays the selected function window.

3.2.1.1 Main Menu Features

You find the *OpenScape Web Client* main menu at the top margin of the browser window.



The main menu contains the following elements (from left to right):

- **The Pearl menu – opening/closing settings**.
- **Entering a number or a name or showing the last dialed numbers** – Entry field for phone numbers respectively names combined with the "Show last called numbers" list field.
- **Searching in all databases** – an icon for finding address data.
- **Calling the desired subscriber** – an icon for initiating a call.
- **Dropping a call** – an icon for closing an existing connection or for terminating an initiated call.
- **Name display** – display of your user name.
- **Device settings** – the combo box device shows your currently preferred device. With a click on the small triangle on the right margin of the combo box you can configure the device settings.

- **Settings for rule profiles and routing rules** – a combo box for setting rule profiles and routing rules.
- **Menu** – the general menu for performing the basic settings.
- **The producer logo**.
- **Changing to small/large view** – the icon for minimizing/maximizing the browser window.

Via the main menu you can execute the following features (description from left to right):

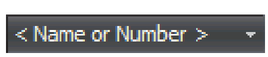
The Pearl menu – opening/closing settings

You open the Pearl menu with a click on the Pearl icon. This menu provides faster access to the features **Status Information**, **View**, **Help** and **About**. In the second column of this menu you can see additional information about the menu options offered here. If you select, for example, the **Status Information**, menu option, you can directly access your **Missed Calls** and your **Voicemail** mailbox. If the associated feature windows are not (yet) integrated in the interface, the information is displayed in a new dialog. If you have the feature windows integrated in the interface, the relevant feature window will shortly "shiver" to indicate where you find the desired information.

The Pearl icon indicates by way of rotating that a new voicemail has arrived in your mailbox or that you did not answer a call because of being absent, for example.

NOTE: So that the icon is able to rotate, the **Play animations in web pages** option must be set. You find this option via **Tools > Internet Options > Advanced** tab under the **Multimedia** caption.

Entering a number or a name or showing the last dialed numbers



With a click in this entry field and after entering a phone number or name you an initiate a call or look for contact information.

To initiate a call, push the  icon after specifying a number or name.

NOTE: To initiate a call via name entry, the respective name must be linked to a phone number in your contact list or in a global address book.

With a click on the triangle icon at the right margin of the entry field you open a list that displays the 20 phone numbers dialed last.

To make a call to one of these numbers, select it in the list and enable the  icon.

Searching in all databases

When you click this icon, an entry mask opens in which you can look for a contact by specifying various search criteria.

Calling the desired subscriber

Click this icon to make a call to the number you have entered or selected from the list of the last dialed numbers.

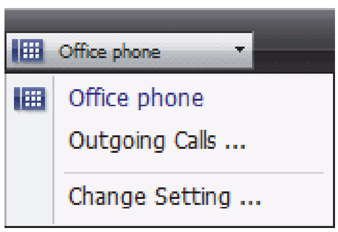
Dropping a call

Enable this icon to terminate a call or to stop initiating a call.

Name display

At this position of the main menu you see the name under which you are logged in to the system.

Device settings



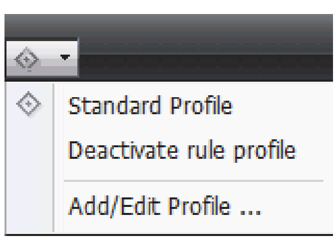
On this combo box you see the device that you have currently set as your favorite one for incoming calls.

When you click the triangle icon at the right margin of the display, the device settings menu opens.

Here you can, for example, select a previously specified device for your incoming calls. Via the **Change Setting** option you can perform rule profile settings and configure the *One-Number Service*, which displays your phone number to the caller or called subscriber independently from the device used. Furthermore, you can perform a call diversion.

You can use the **Outgoing Calls** option to quickly set a device to be preferred for the *One-Number Service* when making calls.

Settings for rule profiles and routing rules

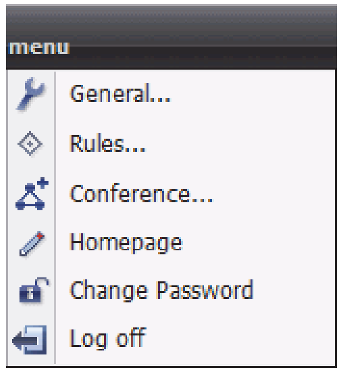


The profile and rule settings enable you to specify routing rules for incoming calls. These rules route the calls to a specific device depending on the caller and call time.

A click on the rule menu opens the settings for activating/deactivating or selecting a rule profile.

Via the **Add/Edit profile...** menu option you can specify further profiles for devices.

Menu



Via **menu** you can access the general definition settings of *OpenScape Web Client*. In addition, you can directly access the dialog for setting up conferences and playing voicemails from there.

A click on **menu** opens the menu for the features:

•**General** (like under device settings).

•**Rules** (like under profile settings).

•**Conference** opens the dialog for establishing a conference.

•**Voicemail** opens the dialog for editing (playing) voicemails.

- **Homepage** for configuring the browser interface.

> ***NOTE:*** When you use the compact view of the user interface, the **Homepage** option is hidden.

- **Change Password** for modifying the password.
- **Log off** for quitting the system.

The producer logo

The producer logo of the *OpenScape Web Client*.

Changing to small/large view

NOTE: You can see this option only if you have selected **Appearance** > **Select start option** > **Large View** in the settings dialog.

If the web browser displays the large view when you open the *OpenScape Web Client*, this option is available for restricting the browser view. Initially, this view displays two function windows next to each other. After a click on the icon at the right margin of the main menu bar, the browser display is limited to the left function windows. The size of the browser window remains unchanged. In this view you can still reach all features of the caption bar but their representation is smaller.

NOTE: When configuring the workspace (**menu > Hompage**) please bear in mind which view you prefer. The minimized view may, for example, hide windows important to you.

After you have minimized the view, the arrow on the icon turns. This indicates your using the restricted view. By enabling the browser update you can bring back the view to normal state again.

NOTE: You can reduce/increase the hight of the browser window by moving the window margins with the mouse.

3.3 Main Menu Features

3.3.1 The Pearl Menu

To open the pearl menu, click on the pearl menu icon on the left hand side of the main menu. The pearl menu offers the following operating options:

- **Status Information**
- **Display**
- **Personal Settings**
- **Help**
- **About**

3.3.1.1 Status Information

Call the Status Information to retrieve the following information:

- **Missed Calls**
- **Voicemail**
- **Further status reports**

NOTE: If the feature window **Missed calls** or **Voicemail Box** is not integrated in the surface, the information is displayed in a separate dialog box. If you have the feature windows integrated in the interface, the relevant feature window will shortly "shiver" to indicate where you find the desired information.

Missed Calls

Click on this menu entry to display the journal for calls you have not answered. The missed-calls journal is displayed.

Via this option you can execute the following features:

- To transfer the contact data of this call to your contact list, select the corresponding call from the journal. Then click the **Add to contacts** icon. The contact entry mask opens with the contact information already known. If required, supplement the information and click on **OK** to store the data in your contact list.

- To view the information available for a journal entry, select the corresponding call from the journal. Then click the **Show Contact Information** icon.
- To delete a journal entry, select it. Then click the **Delete Contact** icon. If you want to delete several journal entries simultaneously, select the corresponding entries and click on **Delete Contact**. You can make a selection via **Ctrl** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.

  NOTE: If no journal entry is selected, the entire journal is deleted when you enable the **Delete Contact** icon.

- To print the entire journal information, click the **Print contacts** icon. The journal information is printed out in table form.
- Per Caller ☐ To display only one entry per caller in the journal you can set the **Per caller** option. If a caller tried to reach you several times, only the last attempt will be logged. This maintains a clear journal overview.

Voicemail

Click on this menu entry to display the journal for incoming voicemails. The voicemail box journal opens.

The Voicemail Box (optional) displays your received voicemails.

NOTE: If the voicemail inbox window shows the message: "*Connection to Voicemail server is not configured!*", please consult your system administrator for solving the problem.

To edit the voicemails in your inbox you can use the following features:

- To delete a journal entry, select it. Then click the **Delete Contact** icon. If you want to delete several journal entries simultaneously, select the corresponding entries and click on **Delete Contact**. You can make a selection via **Ctrl** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.

  NOTE: If no journal entry is selected, the entire journal is deleted when you enable the **Delete Contact** icon.

- To store an inbound voicemail locally, select it in the journal and click the **Store Voicemail entry** icon. A directory selection dialog opens in which you can specify the storage location and the voicemail name. After you have locally saved the voicemail, it is still available also after removing it from the journal.
- How to control a conference is described in Section 3.5.6, “Voicemail Box (optional)”, on page 70.

Further status reports

In the bottom section of the status information further system reports may appear.

The following system message may appear, for example:
“*Connection to the Voicemail server not configured!*”.

In such a case please contact your system administrator so that the indicated problem can be solved.

3.3.1.2 Display

Invoke the display to retrieve the following information:

- **Call Control**
- **Contacts (compact) or Contacts**
- **Conferences**
- **Directory Search**
- **Journal**

NOTE: If you have integrated the feature windows that can be called in the interface, the relevant feature window will shortly "shiver" to indicate where you find the desired information.

Call Control

Click on this menu entry to open the call control. Incoming as well as outbound calls are displayed in the Call Control dialog. This dialog opens automatically as soon as you initiate a call or are being called by another subscriber.

This dialog shows in case of a call the following information:

- The call status.
- The phone number of the conversational partner.
- The name of the conversational partner (if already contained in an address book).
- A toolbar with editing features:
  – Enter the phone number of another subscriber in the **New Call** entry field and enable this icon to initiate the call.
  – Click on this icon to request a return call if the callee does not answer the phone.

  NOTE: This feature is not available for all PBXs:

  – Click on this icon to transfer a call to another subscriber. You can transfer the call to a predefined subscriber but also to any other subscriber.
  – Click on this icon to hold a call. This will interrupt the transmission of voice signals. The waiting conversational partner will then hear music-on-hold. Click on the icon to resume the conversation.

  NOTE: This feature is not available for all PBXs:

– To initiate a consultation call, enter the phone number of another subscriber in the **New Call** entry field during the conversation and enable this icon . If you want to transfer the call to the subscriber who you consult, click on the icon.

You find information about the operating functions in this window in Section 3.5.2, "Call Control", on page 60.

Contacts (compact) or Contacts

Click on this menu entry to open your contact journal (compact). You find information about the operating features of this window in Section 3.5.9, "Contacts (compact)", on page 81 or in Section 3.5.10, "Contacts", on page 88.

Conferences

Click on this menu entry to open your conference journal. You find information about the operating functions in this window in Section 3.5.8, "Conferences", on page 75.

Directory Search

Click on this menu entry to start looking for contact data. The mask for the advanced search with search criteria opens in a new window.

NOTE: You can also start a search request via the main menu icon **Search in all databases**.

You find information about the operating functions in this window in Section 3.5.14, "Directory Search", on page 92 and Section 3.5.15, "Directory Search (extended)", on page 94.

Journal

Click on this menu entry to open your telephone journal. You find information about the operating functions in this window in Section 3.5.4, "Journal (all Calls)", on page 67.

3.3.1.3 Personal Settings

Add to Favorites

Click on this menu entry to add the current URL of the *OpenScape Web Client* to the list of your internet favorites.

3.3.1.4 ? Help

You can open this user manual via **Help**.

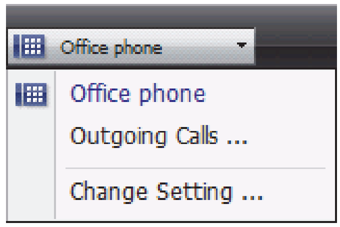
NOTE: The user manual is available in the PDF format. In order to be able to open the help document, the Acrobat Reader application program must be installed locally on your computer.

Clicking on **User manual PDF** opens the user manual in a separate browser window.

3.3.1.5 About

Select the **About** function for having the *OpenScape Web Client* version number and the Software License Agreement displayed.

3.3.2 Device Setting

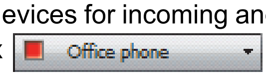


Next to the name of the user currently logged in you find the combo box for device settings. On this combo box you see the device that you have currently set as your favorite one for incoming calls.

When you click the triangle icon at the right margin of the combo box, the device settings menu opens.

Here you can, for example, select a previously specified device for your incoming calls. Via the **Change Setting** option you can perform rule profile settings and configure the *One-Number Service*, which displays your phone number to the caller or called subscriber independently from the device used. Furthermore, you can perform a call diversion.

You can use the **Outgoing Calls** option to quickly set a device to be preferred for the *One-Number Service* when making calls.

NOTE: If you have configured different devices for incoming and outgoing calls, a red icon is displayed on the combo box 

.

3.3.2.1 One-Number Service

The *One-Number Service* feature enables the user to combine mobility, optimal availability and transparency towards third parties.

Via the *One-number service* you define the device to be preferred for outgoing calls that you initiate with the help of the *OpenScape Web Client*. The callee always sees the defined number on his/her display.

The inbound *One-Number Service* enables the direct rerouting/forwarding of a call to a definable target. Such a target may be a cell phone or the voicemail box. That means, a caller always sees the number he/she has dialed on his/her phone display and not the number of the device on which the call was actually accepted.

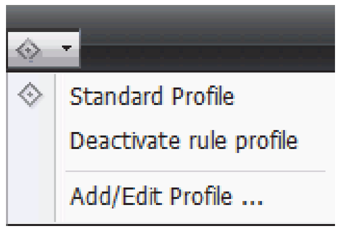
Using the *One-Number Service* feature requires the following settings:

1. Add further forwarding (cell phone, voicemail number etc.) via which you can be reached to your device list. Open the **Forwarding** dialog and specify further forwarding destinations under **Preferred device** by invoking the edit

feature ✎ for incoming and outgoing calls. You find the settings dialog under **menu > General > Common > Forwarding**. See Section 3.6.1.3, “Forwarding”, on page 107.

2. Activate the feature under **menu > General > Common > Forwarding > Preferred device**. There you can select the desired *One-Number Service* device for **incoming** and **outgoing calls**. See also Section 3.6.1.3, “Forwarding”, on page 107.

3.3.3 Profile and Rule Settings



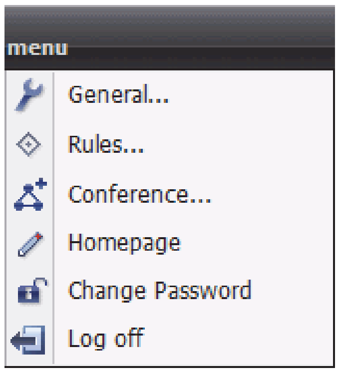
The profile and rule settings enable you to specify routing rules for incoming calls. These rules route the calls to a specific device depending on the caller and call time.

The combo box for the profile and rule settings displays whether (orange icon) or not (gray icon) a profile is active.

When you click the triangle icon at the right margin of the display, the profile and rule settings menu opens.

Here you can deactivate the rule profile, activate an already defined profile or, via **Change profile...**, create new profiles with the associated routing rules.

3.3.4 Menu



Via **menu** you can access the general definition settings of *OpenScape Web Client*.

The following settings can be made:

- Select **General** to perform the basic *OpenScape Web Client* settings. In this menu you can use dialogs for defining general parameters and administering addresses. See Section 3.6, “General Settings”, on page 100.
- Select **Rules** to configure a profile and routing rules so that incoming calls are routed to the devices you have specified. See Section 3.7, “Rule Profile – Handling Calls with Rules”, on page 133.
- Select **Conference** to open the entry mask for scheduling a conference. See Section 3.5.8, “Conferences”, on page 75.
- Select **Voicemail** to open the configuration pages to set your voicemail parameters. See Section 3.8, “Voicemail Settings (optional)”, on page 182.
- Select **Homepage** to adjust the *OpenScape Web Client* interface to your communication requirements. In the browser a new window opens in which you can structure your workspace or configure further alternative workspaces. See Section 3.4, “Homepage”, on page 51.

NOTE: When you use the compact view of the user interface, the **Homepage** option is hidden.

- Select **Change Password** to modify your existing password.
- Select **Log off** to quit the server.

NOTE: When you log off from the server, the user name and password will be deleted. To log back into a system with the *OpenScape Web Client* you need to enter the user name and password once more. Both will be stored in the browser in a cookie when you log on to the server for the first time. In this way you can update the browser without having to log back into the system.

3.4 Homepage

NOTE: When you use the compact view of the user interface, the **Homepage** option is hidden.

You can use different portal interface views.

- When you start the *OpenScape Web Client* for the first time, the **compact view** server pre-setting is used. In this view you can reach all function windows via a combo box or tabs that appear under the caption bar.
- You can customize five different portal interface views and use them alternatingly. This allows you to adjust the window views to your special operating requirements.

Adjust the portal interface (workspace) of the *OpenScape Web Client* to your requirements for efficient use.

How to reach the mode that allows defining or selecting a customized portal interface view from the compact view:

1. Open the **Appearance** tab via **menu** > **General** > **Common** >.
2. Select the **Large view** option in the **Select start option** combo box.
3. Click on **OK** at the bottom dialog margin.
4. Update the browser view of the *OpenScape Web Client*
   .
   Now you see the portal interface the workspace of which you can customize.
5. Invoke the function for defining or selecting your individual portal overview via **menu** > **Homepage**.
   In the browser a new window opens in which you can structure your workspace or configure further alternative views.

3.4.1 Configuring the Homepage

After you have invoked the **Homepage** function, the main menu for defining or selecting a new portal view is displayed in the caption bar of the portal view.

This menu contains the following features (from left to right):

- The Pearl menu

> ***NOTE:*** The Pearl menu features are described in Section 3.3.1, “The Pearl Menu”, on page 41.

- The product name.
- The combo box **Select Perspective**. The following settings take place here:
  – Selecting a workspace from the five you have defaulted for the *OpenScape Web Client*.
  – Implementing or changing the configuration of the selected perspective.

  How to create such a view is described in Section 3.4.2, “Configuring a View”, on page 52.
- The **Save** icon for storing modifications to the currently displayed view.
- The **Restore** icon for restoring the state of the currently displayed view saved last.
- The **Preview** icon that allows to check currently performed modifications before saving them.
- The **Close Editing** icon for returning to the *OpenScape Web Client* main window.

3.4.2 Configuring a View

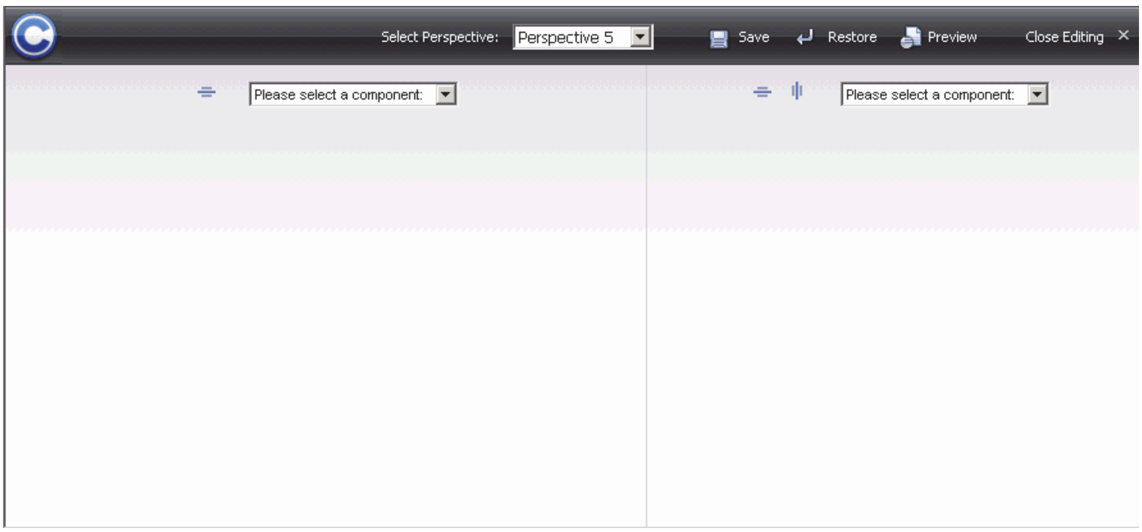
You can default various *OpenScape Web Client* views to react to different operating situations appropriately. All views can be displayed in the minimized or maximized representation.

> ***NOTE:*** In case of the minimized representation only the left column of the browser window is displayed. This applies also if you enhance the interface with another column. If you intend to work frequently with the minimized represen-

tation, you should not forget to integrate the most important features in the feature selection in the left column. These can then also be monitored and operated in the minimized representation.

How to create a new view:

1. Select the **Homepage** item from **menu**. The browser display switches to the view settings page.



> ***NOTE:*** In the basic state, i.e. without previous configuration, two frames are displayed next to each other (tile frames), for both of which feature windows can be defined.

2. Use the **Select Perspective** combo box to determine in which view the following settings are to be saved or called later on.

3. If required, supplement or reduce the number of frames.

> ***NOTE:*** Theoretically you can integrate any number of frames in the interface. You should limit yourself to the features you really need. Too many feature windows affect the workspace clarity.

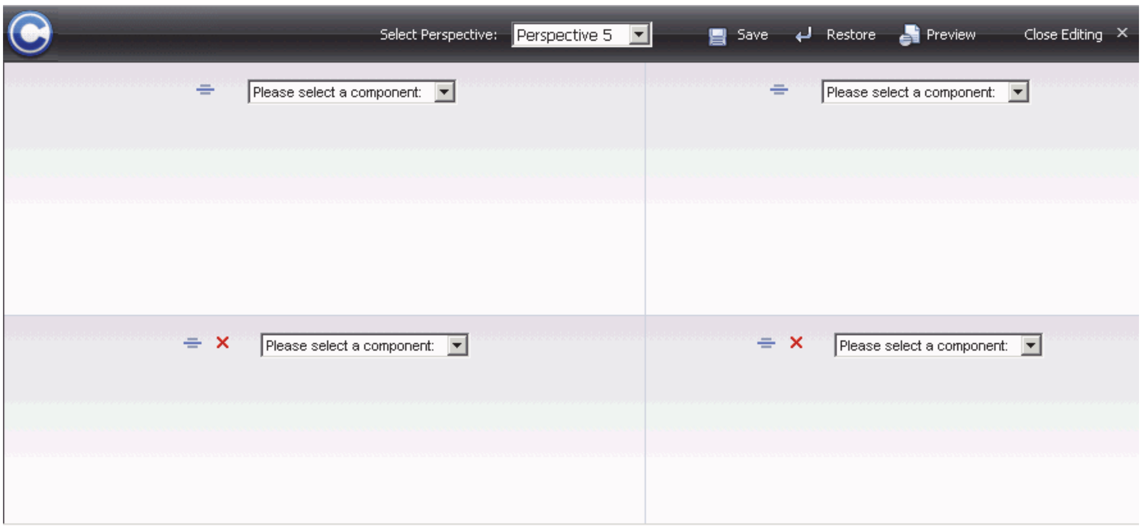
– You can divide a frame horizontally via this icon. This will result in two overlapping frames, which can be configured differently.

– You can divide a frame vertically via this icon. This will result in two tile frames, which can be configured differently.

– Via this icon you can remove a frame from the workspace.

NOTE: You cannot delete the two frames available in the basic state.

In the following example the two frames that exist in the basic state (see previous illustration) have been divided horizontally via the function .

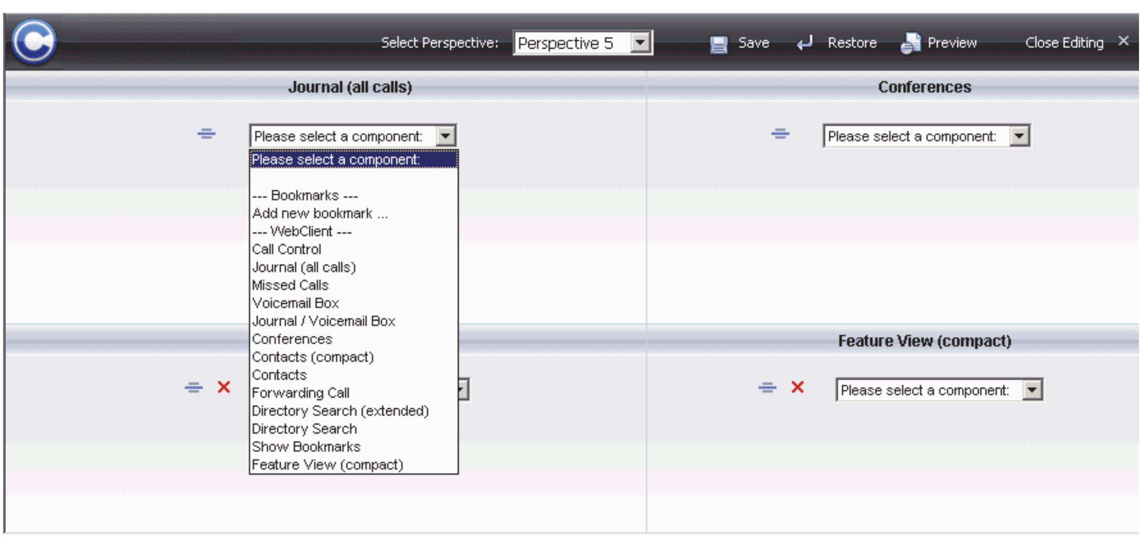


4. Specify for the single frames the features that you want to integrate in the workspace. For this purpose, select the desired features for each frame via the **Please select a component** combo box.

   In the next example figure the following feature windows have been integrated in the user interface:

   Left browser column: **Journal (all calls)** and **Contacts**

   Right browser column: **Conferences** and **Feature View (compact)**



The following features are currently available for integration in the GUI of the *OpenScape Web Client*:

You will find detailed information on the operating options in the individual feature windows in Section 3.5, “Journal Window Features and Workspace Dialogs”, on page 59.

-- Bookmarks --

- **Add New Bookmark**
  Opens the dialog for specifying bookmarks for internet pages. These bookmarks can be integrated as feature window in the selected frame via the **Showing Bookmarks** feature.

- **Select bookmark**
  All internet pages you have predefined via **Add new bookmark** are displayed in the combo box of the component selection with the name you have selected. Thus you can create a pool of frequently required internet pages that you can directly show in a feature window of your choice. The internet page you select here is permanently displayed in the frame that you select for one of the predefined internet pages.

IMPORTANT: Some internet pages are programmed via Javascript in a way that they automatically occupy the entire browser window when you invoke them. The invoking user cannot prevent this and the internet page will then block access to the settings dialogs, so that removing it again is awkward. Test this behavior with a click on the **Preview** button after you have selected the internet page. If the set internet page occupies the entire window, close the preview window with a click on the **Close** icon at the top right margin of the preview window. Then select another internet page or the bookmark view for this window.
In case you have selected an internet page that occupies the entire workspace, you can invoke the *OpenScape Web Client* with an URL extension to directly reach the “Edit Hompage” mode. Here you can then select another internet page or the bookmark view for this window. The address extension reads:
`<URL of the OpenScape Web Client>`**`/tweb/portal`**
  `/req?loadOpenScape&edithomepage=true`
and must be entered without line break.

-- Web Client --

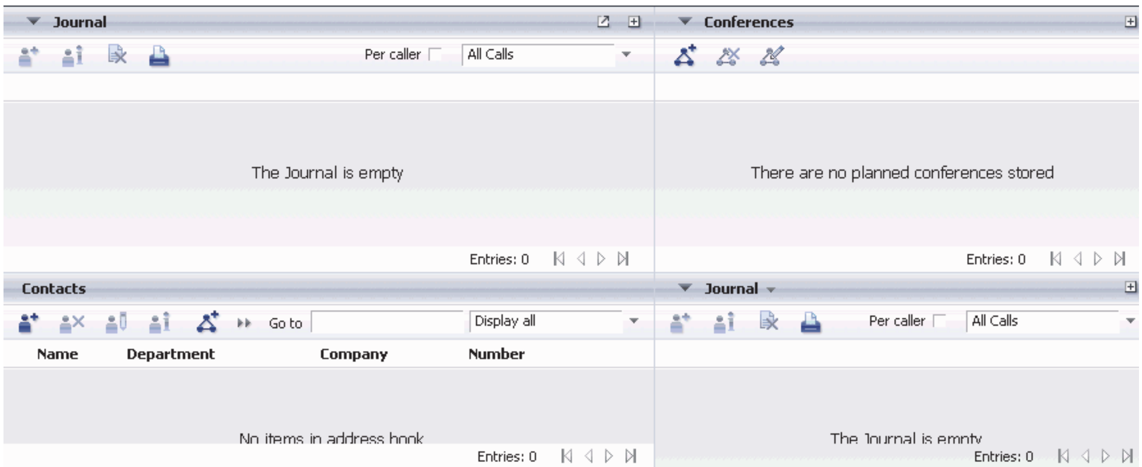
- **Call Control**
  Provides in the selected frame the feature for controlling your telephone.

- **Team View (optional)**
  Displays the members of your team in the selected frame. It also provides the team features depending on the assigned privileges.

- **Journal (all Calls)**
  Lists in the selected frame all calls made or coming in via your telephone.
- **Missed Calls**
  Lists in the selected frame all calls that arrived at your telephone and that you did not answer.
- **Voicemail Box (optional)**
  Creates in the selected frame a journal that lists all voicemails you have received and via which you can play your voicemails.
- **Journal/Voicemail Box**
  Creates in the selected frame a journal that lists all calls and all voicemails you have received.
- **Conferences**
  Creates in the selected frame a journal that provides the features for scheduling conferences. In addition, all conferences you have scheduled are displayed.
- **Contacts (compact)**
  The **Contacts (compact)** window is your private *OpenScape Web Client* address book. You can use it to manage your private contact data.
- **Contacts**
  Contrary to the **Contacts (compact)** dialog, the **Contacts** window represents additional contact data in the journal. Furthermore, it is expanded by the **Go to** quick-search feature for contact entries.
- **Shared Address Books (optional)**
  Provides all shared address books for selection in the selected frame.
- **All Address Books (optional)**
  Provides all address books, thus also the contact list entries, for selection in the selected frame.
- **Redirect Call**
  Provides in the selected frame the features required for configuring a call forwarding.
- **Directory Search (extended)**
  Displays in the selected frame the entry mask for finding contacts.
- **Directory Search**
  Displays in the selected frame the **Search** feature. When you enter a search item, the contact you want to find is searched for in all available address books.
- **Showing Bookmarks**
  Creates in the selected frame a journal that lists all bookmarks you have configured via *OpenScape Web Client*.

- **Feature View (compact)**
  In this dialog you can use the window caption, which is represented as combo box, to variably display the other available windows.

5. Click the **Preview** button to view the result of your interface configuration. The previously configured interface is displayed in a separate window for review. The following figure shows the preview of the GUI of the *OpenScape Web Client* with the example configuration as it is described above.



6. Close the preview window after your review before continuing with the interface configuration.

7. Click the **Save** icon if the you are satisfied with the interface. The interface layout is saved under the configured perspective number and can be called by selecting this view.

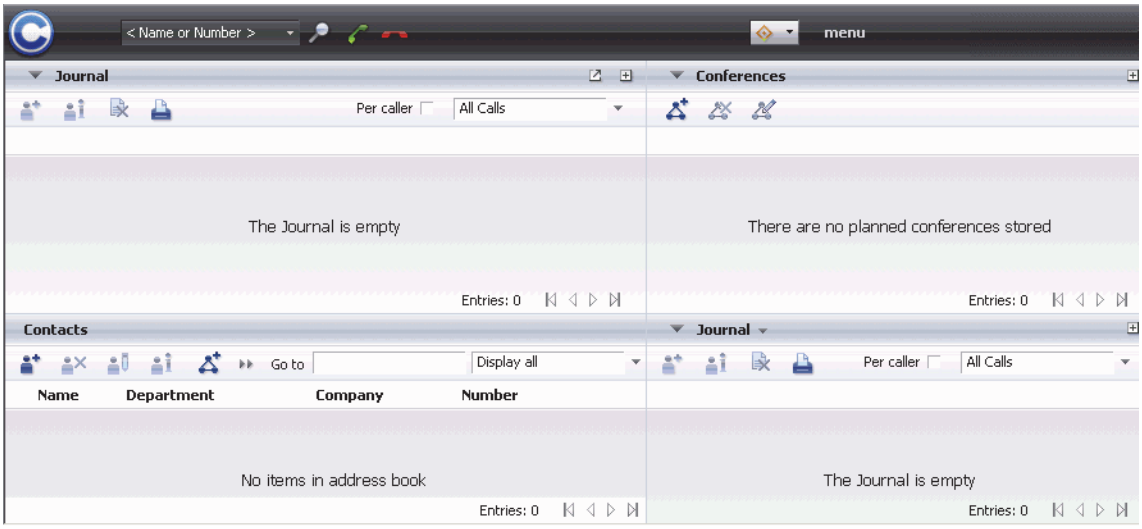
8. Click the **Reset** icon if you would like to return to the last state of this perspective that had been saved or restore the basic setting perspective.

   – Select **Yes** in the query dialog to reset the perspective to the basic state. This is recommended e.g. if you would not like to perform a complete reconfiguration of the perspective.

   – Select **No** to reset the perspective to the last stored perspective if you would like to reset a change you have made earlier.

9. Click the Close Editing button to open the interface in the configured perspective.

   The following illustration shows the interface for the example configuration described above.



3.5 Journal Window Features and Workspace Dialogs

3.5.1 General Items

The caption bars of journals and dialogs contain controls for modifying the representation of window contents.

In these caption bars you find the following icons:

- Minimize window to caption bar.
- Re-expand window.
- Represent journal or dialog in a separate window.
- Only represent this window in the column.
- Represent all windows in the column again.

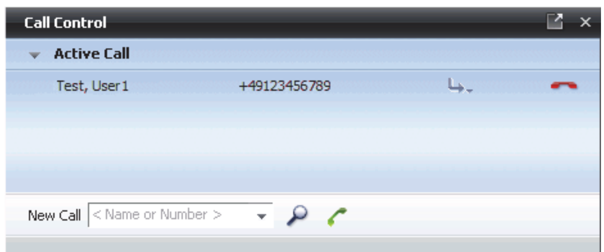
At the bottom margin of journals and dialogs you find operating elements that serve to improve navigating in the corresponding dialogs. Thus, the value next to **Entries** indicates which entries you currently see in the journal and, in brackets, the total number of entries contained in the journal. If more entries are available than can be displayed in the list, these icons become active. You can then use the arrows to move to a journal entry:

- The next entries are displayed.
  Example: If six entries can be seen in a journal, the next six entries are displayed.
- The previous entries are displayed.
  Example: If six entries can be seen in a journal, the previous six entries are displayed.
- The journal displays the top of the list.
- The journal displays the end of the list.

3.5.2 Call Control

NOTE: Not all of the telephony features described here may be available. They depend on the PBX used and its software level, as well as on the terminal devices used.
The callback feature (in case of a busy line or unanswered call) is not supported with the *OpenScape Web Client*.
If multiline-compatible phones are used, the *OpenScape Web Client* supports the primary line only. See Section 1.3.1, “Multiline-compatible Telephones”, on page 12.
If you have questions, please consult your system administrator.

The **Call Control** dialog provides the control features for your telephone.



In case of outgoing or incoming calls this dialog displays information about the connection status:

- The phone number of the calling (if known) or called subscriber.
- If possible, the name of the calling or called subscriber.
- The icons for controlling the connection.
  The following sections describe the meaning of the icons.

3.5.2.1 Incoming Call

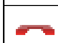
When a call comes in, the call-control dialog opens automatically.

NOTE: Depending on your configuration settings the dialog can be displayed in the foreground of all running applications. See **Pop up on incoming call** in Section 3.6.1.1, “Appearance”, on page 102.

You can use the following features in the **Call Control** dialog for inbound calls:

- **Incoming call**

  In case of an incoming call the following operation options are available:

Icon	Explanation
	**Accept call** When you click on this icon the call connection for an incoming call is set up.
	**Reject call** When you click on this icon the call is rejected and the attempt to set up a connection aborted.
	**Forward call** A click on this icon opens a selection dialog. In there you can pick a subscriber from the list of the last callers or enter a phone number to forward the call to another subscriber.

- **Accepted call**

  In case of an accepted call the following operation options are available:

Icon	Explanation
	**Close connection** When you click this icon the call ends.
	**Forward call** A click on this icon opens a selection dialog. In there you can pick a subscriber from the list of the last callers or enter a phone number to forward the call to another subscriber.

3.5.2.2 Outgoing Call via the “New Call” Feature

Via the **New Call** combo box you can establish a new phone connection by entering a number or name.

- **Establishing a phone connection**

1. Enter a phone number in the **New Call** combo box for this purpose. You can also click the triangle icon on the right margin of the **New Call** combo box to select an entry from the list of the last 20 calls or to find the desired subscriber via the search function .
2. Click on the icon to initiate the call.

   After you have set up the connection you can use the following features to control the call:

Icon	Explanation
	Close connection When you click this icon the call ends.

- **Setting up a consultation call**

NOTE: A consultation call allows setting up another connection during an existing one (consulting on a subscriber). The original connection is being held. When the consultation has been finished, the original connection is active again.

---

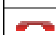
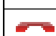
1. Enter the phone number of the subscriber who you want to consult in the **New Call** combo box. You can also click the triangle icon on the right margin of the **New Call** combo box to select an entry from the list of the last 20 calls or to find the desired subscriber via the search function .

NOTE: You can use wildcards (*) in every search criterion.

---

2. Click on the  icon to initiate the call.

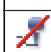
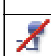
   After you have set up the connection you can use the following features to control the call:

Icon	Explanation
In the top section of the call control, the held initial call	
	**Transfer to new subscriber** With a click on this icon the held call is transferred to the consultation-call subscriber. Your connection is then automatically cleared.
	**Pick up waiting call** When you click this icon the connection to the consultation-call subscriber is cleared. You are automatically reconnected to the original caller.
	**Alternating between** When you click this icon the connection to the original caller is set up again. The connection to the consultation-call subscriber is held. You can toggle the two conversational partners by repeatedly clicking this icon.
	**Start conference** A click on this icon initiates a conference between the subscribers. The caller, the callee and the consultation-call subscriber are then connected to each other.
	**Close connection** When you click this icon the call ends.
In the bottom section of the call control, the active consultation call	
	**Pick up waiting call** When you click this icon the connection to the consultation-call subscriber is cleared. You are automatically reconnected to the original caller.
	**Close connection** When you click this icon the call ends.

- **Setting up a conference connection**

  Conferences are always set up from active calls as is described above under “Setting up a Consultation Call”. In this way you can gradually add further subscribers to the conference.

  The connection control provides the following features for controlling a conference:

Icon	Explanation
In the header	
	**Lock conference** After you have clicked this icon, other potential conference participants cannot log on to the conference anymore. The icon changes to a closed padlock after you have clicked it.
	**Unlock conference** Clicking this icon unlocks the conference again.
	**Mute conference** Sound transmission to all conference participants is interrupted. After you have clicked this icon it turns gray and is crossed out.
	**Cancel conference muting** A click on this icon cancels the conference muting.
	**End conference** Ends the conference by closing down the connections to the other conference participants.
During the connection representation of the conference participants	
	**Mute participant** Sound transmission to a specific conference participant is interrupted. After you have clicked this icon it turns gray and is crossed out.
	**Cancel muting a participant** A click on this icon cancels muting a conference participant.
	Leave conference or remove participant from conference This feature enables you to leave the conference or to remove other conference participants from the conference.

3.5.3 Team View (optional)

NOTE: The *Team View* feature can only be used after the system administrator has released it.

The *Team View* offers useful features for making calls within a team:

- You can directly call a team partner via the receiver icon.
- You can see the phone statuses of the respective team partners.
- If authorized, you can pick up calls to other team partners or forward such calls.
- If authorized, you can access the journal (all calls) of the team partners.

You can compose the team by yourself. In doing so, you can integrate any system user in your team. Furthermore, you can selectively assign the privileges for monitoring your telephone or accessing your call journal to single team partners. In Section 3.6.3, “Team (optional)”, on page 128 you learn how to compose a team and assign privileges to team partners.

The dialog is structured as follows:

- A caption bar, which displays the dialog's function.
- Thereunder you find a toolbar that provides the following features:
  -  **Manage team**. A click on this icon opens a settings dialog for your to compose and configure your team.
- Under the toolbar you find the table header for the list of team partners. With a click on a column description you can reverse the sorting order with reference to the relevant column.
- Thereunder you find the list of team partners with its entries (from left to right):
  - An icon that displays the team partners' telephone status.
    -  This team partner allows you to monitor his/her phone.
    -  This team partner does not allow you to monitor his/her phone.
    -  The line of this team partner is currently busy.
  - In the column under **Team Partner** you see the names of the team members in alphabetic order.
  - In the column under **Caller** you see the number of the extension from which your team partner is receiving a call.

– A button via which you can pick up a call that comes in for one of your team partners.

NOTE: The **Pickup** button is only displayed when a call is just coming in for this team partner and you are authorized to pick it up.

– An icon that lets you access the call journal of this team partner, if he/she has given his/her permission.

  – You may open the call journal of this team partner.
    Click on this icon to open the call journal of this team partner.

  – You must not open the call journal of this team partner.

3.5.4 Journal (all Calls)

The **Journal** dialog logs all in and outbound calls, no matter whether or not they were successful.

The dialog is structured as follows:

- A caption bar, which displays the dialog's function.
- A toolbar, via which the following features can be executed for a selected journal entry:
  - To transfer the contact data of this call to your contact list, select the corresponding call from the journal. Then click the **Add to contacts** icon. The contact entry mask opens with the contact information already known. If required, supplement the information and click on OK to store the data in your contact list.
  - To view the information available for a journal entry, select the corresponding call from the journal. Then click the **Show Contact Information** icon.
  - To delete a journal entry, select it. Then click the **Delete Contact** icon. If you want to delete several journal entries simultaneously, select the corresponding entries and click on **Delete Contact**. You can make a selection via **Ctrl** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.

    NOTE: If no journal entry is selected, the entire journal is deleted when you enable the **Delete Contact** icon.

  - To print the entire journal information, click the **Print contacts** icon. The journal information is printed out in table form.
  - Per Caller ☐ To display only one entry per caller in the journal you can set the **Per caller** option. If a caller tried to reach you several times, only the last attempt will be logged. This maintains a clear journal overview.
  - Via the combo box on the right hand side you can filter the journal entries according to their call status:
    - **All Calls** Default setting that shows all calls in the journal.
    - **Missed Calls** shows the unaccepted calls only.
    - **Incoming Calls** displays the inbound calls only.
    - **Outgoing Calls** displays the outbound calls only.
    - **Team Calls** displays only the calls that your team partners did not accept.

- Under the toolbar you find the table header for the journal entries. With a click on a column description you can reverse the sorting order with reference to the relevant column.
- Thereunder you find the journal with its entries (from left to right):
  - A checkbox to select entries for editing.
  - A symbol that displays the status of the relevant call.
    - Successful outgoing call.
    - Successful incoming call.
    - Unsuccessful outgoing call.
    - Unsuccessful incoming call.
    - Incoming call, redirected.
  - Date when the call came in or was initiated.
  - Name of the caller or callee.

NOTE: The name can only be displayed if it is contained in the contact list or global address book.

  - The phone number you dialed or that was transmitted by the calling subscriber.
  - An icon that enables an immediate return call to the displayed phone number .

3.5.5 Missed Calls

The **Missed Calls** dialog logs all calls that you did not accept. It is thus a subset of the entries in the **Journal** window and offers the same operating options. The only missing element is the combo box on the right for filtering the entries according to the call status.

The following features are available:

- Sorting the entries in ascending or descending sequence by clicking the column caption.
- Adding the caller data to your contact list.
- Displaying the caller data from your contact list.
- Deleting a journal entry. If several entries are selected, all of them are deleted.
- Deleting the entire journal. If no entry has been selected, the entire journal is deleted upon executing the delete command.
- Printing the entire journal in table form. The entries are sorted according to their date of arrival (the latest unaccepted call first).
- **Per caller** option. If this option is set, only one entry per caller is displayed, even if several calls of the same subscriber have arrived.

3.5.6 Voicemail Box (optional)

You can send and receive voicemails if the system *OpenScape Web Client* is logged into is configured as voicemail server. You send voicemails via a voicemail script installed on the voicemail server. The system administrator specifies up to five access numbers that enable you to use the voicemail script with different features. For example, one access number serves for directly connecting your mailbox via telephone. You can then use the phone to record and send a voicemail, to listen to incoming voicemails or to edit your mailbox settings.

Voicemails that were directly sent to your mailbox via the voicemail script and voicemails that were delivered via a phone rerouting can be played via the *OpenScape Web Client* in this way.

These voicemails are displayed in the **Voicemail Box** journal. The voicemails can be played from there via the following features:

- Playing the voicemail via your workstation telephone.
- Playing the voicemail via the PC soundcard by means of Windows Media Player.

The dialog is structured as follows:

- A caption bar, which displays the dialog's function.
- Thereunder you find a toolbar that provides the following features:
  - Deleting the voicemail entry from the journal .
  - Locally saving the voicemail on your PC
- Under the toolbar you find the table header for the journal entries. With a click on a column description you can reverse the sorting order with reference to the relevant column.
- Thereunder you find the journal with its entries (from left to right):
  - A checkbox to select entries for editing.
  - An icon that displays the voicemail status.
    - Voicemail not played yet.
    - Voicemail already played.
  - The date of the voicemail's arrival.
  - The name or the telephone number of the voicemail's originator.

> ***NOTE:*** The name can only be displayed if it is contained in the contact list or global address book.

– An icon that starts the voicemail playback .

– An icon that enables an immediate return call to the displayed phone number .

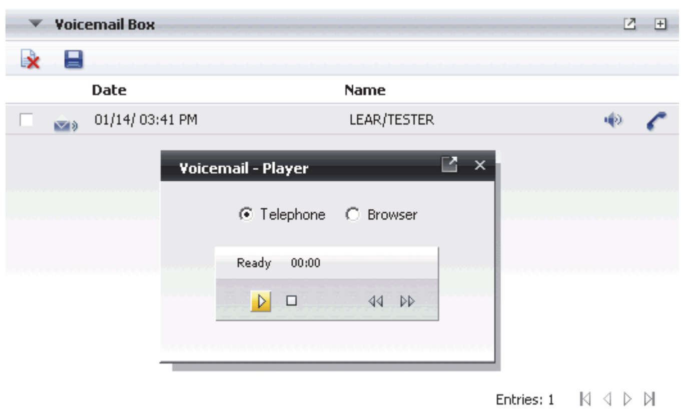
3.5.6.1 Voicemail Playback

NOTE: The voicemail is played back via telephone by default. If you want to play the voicemail via the *Windows Media Player*, set the **Play via browser** option in the playback control.

Playback via telephone (default)

How to play a voicemail via telephone:

1. Select the journal entry of the voicemail you want to play.
2. Push the icon to start the playback. The playback control opens.



On top of operating elements of the playback control you find a status bar that displays the current playback status. After a short initialization period (connection is set up) the status bar displays “Ready”. You can now start the voicemail playback.

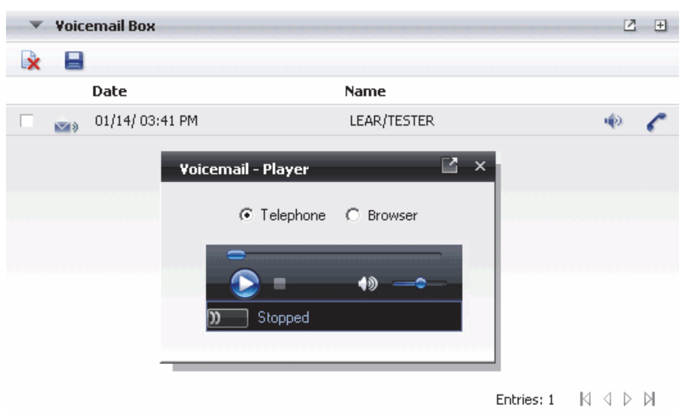
3. The following features are available to play back the voicemail via telephone:

Icon	Explanation
	Start/continue playback After a click on this icon your telephone rings. After having picked up the receiver the playback of the voicemail starts immediately.
	Pause playback The voicemail playback is paused. The icon turns into the **continue playback** icon. Clicking the icon restarts the playback after a pause.
	Stop playback When you click this icon the playback is stopped and reset to the start.
	Rewind Click this icon if you want to rewind the message for listening to a passage again.
	Fast forward Enable this icon if you want to fast forward the message to skip some passages.

Playback via the *Windows Media Player*

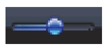
How to play back the voicemail via the *Windows Media Player*:

1. Select the journal entry of the voicemail you want to play.
2. Push the icon to start the playback. The playback control opens.
3. Set the **Browser** option. The *Windows Media Player* playback control is displayed.



Above the play control operating items you will find a progress bar that indicates the rough position during the voicemail playback. Under the operating elements you find a status bar that displays the current playback status. After a short initialization period (connection is set up) the status bar displays “Ready”. You can now start the voicemail playback.

4. You can now use the following operating elements for playback via the *Windows Media Player*:

Icon	Explanation
	**Start playback** After you have clicked this icon, the voicemail is immediately played via the speakers attached to your PC or via headset. After a click on this icon the icon changes to **Pause playback**.
	**Pause playback** A click on this icon stops the playback at the current spot. After a click on this icon the icon changes to **Pause playback**. Thus you can continue the playback.
	**Stop playback** When you click this icon the playback is stopped and reset to the start.
	**Mute** Click this icon to turn off the sound.
	**Set volume** Moving the slider with the mouse you can increase or decrease the volume.

3.5.7 Journal/Voicemail Box

The Journal/Voicemail Box dialog displays the logged calls by default like in the **Journal** window.

The features available here are described in Section 3.5.4, “Journal (all Calls)”, on page 67.

If your system is configured as voicemail server, you can have your voicemails displayed here as well. To this, click in the dialog's header on **Voicemail Box**. The journal view changes and your voicemails are displayed.

The features available here are described in Section 3.5.6, “Voicemail Box (optional)”, on page 70.

3.5.8 Conferences

The **Conferences** window displays the conferences you have configured and those you are invited for.

NOTE: The conferences you have configured via the *Microsoft Outlook* conference extension are displayed there also. But they cannot be edited or deleted via the *OpenScape Web Client*.

You can use the editing options of this *OpenScape Web Client* client window to schedule conferences and to initiate, modify and delete scheduled conferences.

NOTE: You can also configure and initiate conferences in the **Contacts** dialog and via **menu > Conference**.

The following features are available in the Conference dialog:

- To configure a new conference, click on the **Create new conference** icon. The **Conferences** dialog opens. You can use the entry mask on the **Create conference** tab to prepare the conference. Please obtain details for configuring a conference from Section 3.5.8.1, “Configuring a new Conference via the “Conferences” Dialog”, on page 76.
- To edit a configured conference, select the desired conference from the list and click on the **Modify selected conference** icon. The **Conferences** entry mask with the data for the selected conference opens for editing.
- To remove a configured conference from the list, select the desired conference in the list and click on the **Delete selected conference** icon.
- To start a conference, click on the receiver icon in the journal entry of the relevant conference.

NOTE: How to control a conference is described in Section 3.5.2, “Call Control”, on page 60.

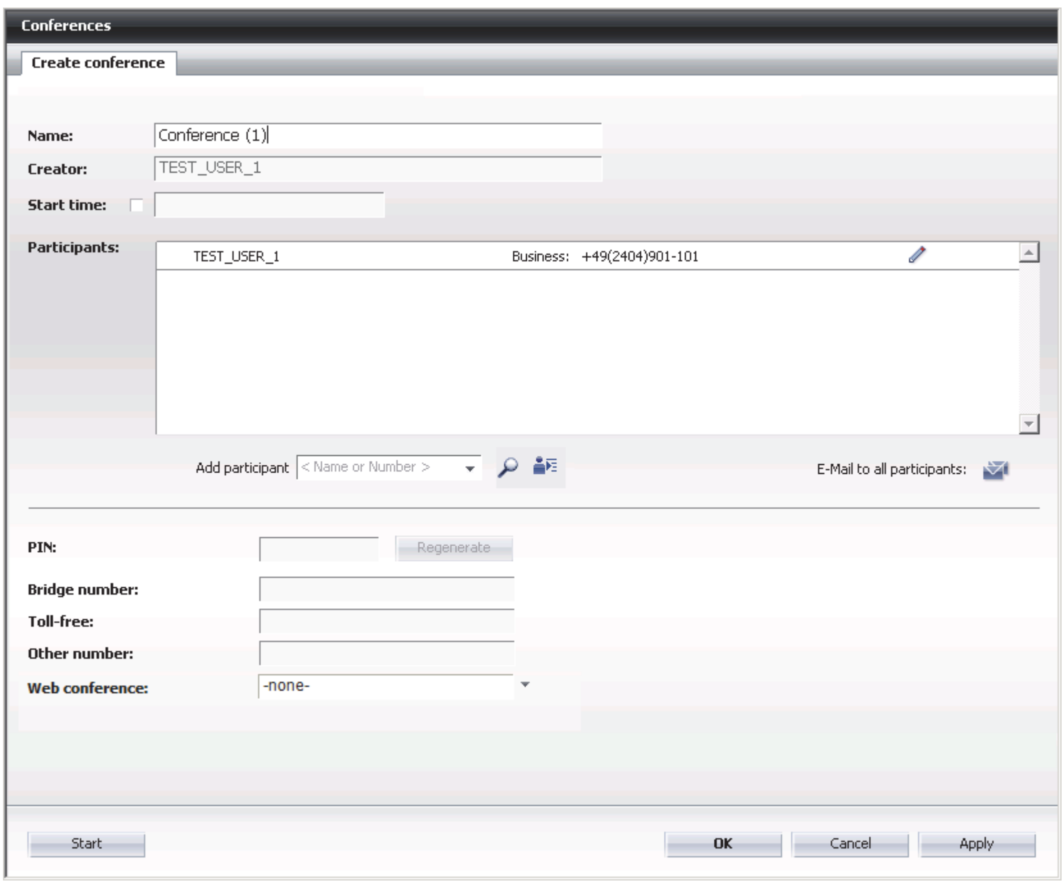
3.5.8.1 Configuring a new Conference via the “Conferences” Dialog

A conference is configured respectively edited in the **Conference** dialog. Via an entry mask you can specify all parameters required for simultaneously calling a group of contacts.

IMPORTANT: Inform external conference participants by e-mail or another medium about the conference time, the conference PIN and the bridge number so that they can join the conference. All system users you have invited for the conference see the invitation in the **Conferences** window.

How to configure a conference:

1. Click the **Create new conference** icon. The **Conferences** dialog opens.



2. Enter the required information and values on the **Create conference** tab. In the following table you find explanations about the single entry fields and options.

Field name	Description
Select	Combo box for selecting an already created conference for editing. If you want to add a new conference, click the **New conference** icon. ***Note:*** If no conference has been configured yet, the mask is empty and you can start making your entries.
Name	Assign a name to the conference. Under this name the conference is displayed in the **Conferences** frame. The name must not exceed 30 characters.
Creator	Here you can see the name of the person that configures the conference.
Start time	Select the checkbox next to **Start time** if the conference is to start at a specific time. An entry field appears in which you can set the date and time for the conference start and in another entry field you can specify the conference duration. Click in these fields to make the appropriate definitions. **Start time**: Default is the time at which you opened the **Conferences** dialog. Click in this field or enable the **Show calendar** icon to change the start time. The calendar dialog opens. Here you can define the date and time. How to set the date: Click the day of the displayed month on which the conference is to take place. You can browse the months using the arrow icons (arrow pointing to the right > upward and arrow pointing to the left < downward). Via the doublearrows (<< >>) you can browse the dates. The icon in the middle position displays the current month. You can set the time via the icons situated next to the time display: The two clock icons on the left serve for counting hours up (+) or down (-); the two clock icons on the right serve for setting minutes (counting up (+) or down (-)). Click the **OK** button in the calendar dialog to save the settings. Click the **Cancel** button to close the dialog without performing a change. **Duration**: The conference duration default is 60 minutes. If you want to change the conference duration, click in the entry field and specify the desired value.
Participants	This section lists all conference members. The inviting user is automatically placed in the list as first entry. A participant entry in the journal contains the following information (from left to right): • The name of the conference participant • The conference participant’s telephone number • The icon to edit the subscriber entry • The icon for deleting an added conference participant

Field name	Description
Add participant	Select one of the following options to add members to the conference: • Enter the phone number or name in the combo box. Then click on the **Add member to the list** icon: A dialog for completing the participant data opens. Specify the missing data (name or phone number) and click in this dialog on **OK**. The selected contact is added to the participant list. • Click on the triangle icon on the right margin of the combo box. The list that displays the last 20 phone numbers you have dialed opens. Select the phone number of the subscriber to be added to the conference. Then click on the **Add member to the list** icon: A dialog for completing the participant data opens. Specify the missing data (name or phone number) and click in this dialog on **OK**. The selected contact is added to the participant list. • Click on this icon to look for a contact in all address books. The entry mask with the search criteria opens. Select the desired contact from the hits and click on **OK** in the Directory Search dialog. The selected contact is added to the participant list.
PIN	When creating a conference a PIN is automatically generated and displayed in this field. Using the PIN the conference participants authorize themselves to join the conference. Via the **Regenerate** button you can create a new PIN.
Bridge number	The **bridge number** set automatically by the system is displayed here. Under this phone number the conference participant needs to log on to the conference. A conference bridge supports several callers under a single phone number.
Toll-free	The **Toll-free** field shows, if configured, an alternatively configured bridge number for a toll-free call to the conference.
Other number	The **Other number** field shows, if configured, an alternatively configured bridge number for a call to the conference.
Web conference	If you wish to prepare the telephone conference for a web conference in addition, select the service provider for the web conference via this combo box. The call control then provides additionally the icon for starting the web conference in the started voice conference. ***Note***: You find information about the web conference client in the operating instructions for the *OpenScape Web Collaboration* product.

3. If you have completed your entries on the **Create conference** tab, the following operating options are available:

   • Click on the **Apply** button to save your settings without closing the **Conferences** dialog.

- Click on the **Cancel** button to dismiss your settings and close the **Conferences** dialog. Subsequently, a dialog with a security prompt opens to make sure that you did not push this button inadvertently.
- Click on the **OK** button to save your settings and close the **Conferences** dialog. At the same time, all system users you have invited for the conference see the conference in the Conferences window.
- Click on the **Start** button to initiate the conference.
- Click on the **Delete** button to delete all entries and to remove the conference from the conference list. The mask view changes automatically to the previously configured conference.

3.5.8.2 Configuring a new Conference via the “Contacts” Dialog

How to configure a conference via the **Contacts** window:

1. Select all contacts with whom you want to hold a conference.
2. Click the **Configure conference** icon. The **Conferences** dialog opens. Besides yourself as conference initiator the contacts you have previously selected are already entered in the participant list as conference participants.
3. In the **Conferences** dialog click on the **Apply** and **OK** button to configure the conference.
4. Inform external conference members by e-mail or another medium about the conference time, the conference PIN and the bridge number so that they can join the conference. All system users you have invited for the conference see the invitation in the **Conferences** window.
5. Start the conference with a click on the **Start selected conference** icon in the toolbar of the **Conferences** window.

   You can also start the conference from the **Conferences** dialog with a click on the **Start** button.

NOTE: The conference is finished as soon as the last member has left the conference.

3.5.8.3 Editing Conference Settings

To edit an already configured conference, select it in the **Conferences** dialog and click on the **Modify selected conference** icon. The **Modify conference** tab of the **Conferences** dialog opens. You can now change the settings of the selected conference.

3.5.9 Contacts (compact)

The **Contacts (compact)** window is your private *OpenScape Web Client* address book. You can use it to manage your private contact data.

NOTE: As alternative to the **Contacts (compact)** dialog you can also use the **Contacts** window. It offers an extended journal view and, in addition, the **Go to** feature for quickly finding specific contact entries in the journal view. The additional features in the Contacts window are described in Section 3.5.10, "Contacts", on page 88.

The compact view of the **Contacts** dialog displays the following information for each listed contact (from left to right):

- A checkbox for selecting the entry.
- The name.
- The workstation phone number.
- An icon that allows sending an e-mail to this contact.

  NOTE: An e-mail address must exist in the contact information for this purpose.

- An icon that allows making a call to this contact.

3.5.9.1 Operating Options of the Contacts Window

The following features are available in the **Contacts (compact)** as well as in the **Contacts** dialog.

NOTE: Some features will not become active until you select a contact entry in the journal.

In the caption bar:

- You can use the alphabet displayed here to quickly invoke contact entries. If an initial letter matches at least one entry, the initial letter in the alphabet appears in black and can be selected.
  - Click on the initial letter of the contact name you are looking for. The entries in the journal will then be shown from the contacts that begin with this letter.

Via the toolbar:

- To create a new contact entry, click on the **Create contact** icon. The contact entry mask opens. How to create a new contact entry is described in Section 3.5.9.2, “Adding a Contact”, on page 84.
- To delete a contact entry, select it. Then click the **Delete user entry** icon. If you want to delete several contact entries simultaneously, select the corresponding entries and click on **Delete Contact**. You can make a selection via **Ctrl** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.
- To edit a contact entry, select it and click on the **Edit contact** icon. The contact entry mask with the already available data opens. How to edit a contact entry is described in Section 3.5.9.3, “Editing Contact Entries”, on page 85.
- To view the information available for a journal entry, select the corresponding call from the journal. Then click the **Show Contact Information** icon. The data for this entry are displayed in a separate window.
- To locally store the entire contact list with all data on your computer, click on the **Save addresses** icon. A new window opens that displays your contact data in table form. In this window select **File > Save As**. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
- To print the entire contact list, click the **Print contacts** icon. The journal information is printed out in table form.
- To configure a conference, select the desired conference members in your contact list and click on **Configure Conference**. The **Conferences** dialog opens. The participants you have selected in the contact list are then already present in the **Conferences** dialog as conference participants. How to configure a conference is described in Section 3.5.8.1, “Configuring a new Conference via the “Conferences” Dialog”, on page 76.
- **Combo box**
  You can assign an attribute to the contact entries that groups the contacts in address groups (categories). This enables a faster access to the contact data. Via the combo box in the toolbar you can display the contacts filtered according to an address group or administer the address groups. The following options are provided via the combo box:
  - **Display all** shows all contacts in alphabetic order, either ascendingly or descendingly.
  - Thereafter the address groups you have already configured are offered for selection.
  - **Edit**, opens the dialog **menu > General > Common > Address Groups** for creating further address groups.

Via the journal entry:

- Writing an e-mail to the contact. A click on this icon opens the e-mail form of your default e-mail application for sending an e-mail to this contact.
- Initiating a call to the contact.

How to specify address groups and work with them is described in Section 3.5.9.4, “Working with Address Groups”, on page 86.

3.5.9.2 Adding a Contact

How to add a new external or internal contact to the **Contacts** window:

1. Click on the **Create new user entry** icon. The **Add entry to contact list** dialog opens.

Creating an external contact

External contacts are defined manually via the contact data fields. How to create an external contact after you have opened the **Add entry to contact list** dialog:

1. Enter the contact data in the appropriate fields.
2. Click the **OK** button to save the contact data.
3. Alternatively, click on the **Cancel** button to close the dialog without creating a new contact list entry.

Creating an internal contact

Internal contacts are contained in address books internally available in your organization and you can copy them into your contact list from there. How to copy an internal contact into your contact list after you have opened the **Add entry to contact list** dialog:

1. Enter the contact's name or the first letters of this name in the **Surname** field.
2. Click on the icon to look for contact data in the address books.
   The **Directory Search** dialog opens and shows a list with all contacts that match your entry.
3. Select the desired contact from the list by ticking off the checkbox that precedes the list entry.
4. Click the **Add** button to copy the contact data into your contact list.
5. Alternatively, click on the **Cancel** button to close the dialog without copying the contact data into your contact list.

3.5.9.3 Editing Contact Entries

You can change or supplement the contact data retrospectively.

How to edit a contact entry.

1. Select the contact entry to be edited in the **Contacts** window by ticking off the checkbox that precedes the contact name.
2. Click the  **Change user entry** icon. The **Change entry in the contact list** dialog opens with the already available contact data.
3. Modify the contact data.
4. You can use the **Edit note** button to enter private information with current time stamp on this contact. The **Notice to** dialog opens.

   NOTE: This information is private, thus only accessible to the user who has entered the note.

   – Click in the text field.

   – Enter your note text.

   – If you wish to create a time stamp for the note in addition: Place the cursor in the text field where you want the time stamp to be inserted and click on the **Add Date/Time** button.

   – Complete your entry with a click on the **Save** button.

   – Accomplish the procedure with a click on the **Close** button. The dialog for entering a note closes.
5. Click the **OK** button to save the modifications and to close the **Change entry in the contact list** dialog.

   NOTE: Click on the **Cancel** button to close the **Change entry in the contact list** dialog without performing a modification to the contact data.

3.5.9.4 Working with Address Groups

Address groups enable the structuring of the contact list content to provide a clear overview. You can assign an attribute to a contact entry, which labels the contact as member of a group you have specified. For example, you can group your contacts according to company membership, departments or as private. Via the contact list you can then selectively access these groups.

NOTE: So that a contact is integrated in a specific address group, the contact must be explicitly assigned to an address group via **Assign to address group** upon the definition of a contact entry. The address group to which this contact entry belongs is then specified in the **Address group** user entry.

You can use the combo box in the **Contacts** dialog to display existing groups, create new groups, delete or rename them.

How to display the contacts of an existing group in the contact journal:

1. Click in the combo box of the **Contacts** dialog. The list of already existing address groups is displayed.
2. Select the desired address group. The address group is displayed in the combo box and the associated contacts appear in the journal of the **Contacts** dialog.

How to specify, delete or rename an address group:

Specifying a new address group

1. Click in the combo box of the **Contacts** dialog. The list of already existing address groups is displayed.
2. Select here the **Edit** feature. The dialog **menu > General > Common > Address Groups** opens.
3. To specify a new address group, click on the **New group** button.
4. Click the default name (new address group) and enter an expressive name for the new address group.
5. Press the **OK** button. The address group is saved and the **General settings** dialog closed.

Specifying the address group is thus accomplished. You can now select this group under the entered name in the combo box of the **Contacts** dialog. All contacts who you assign this group name in the **Address group** field of the contact details mask will be displayed when you select this address group.

Deleting an address group

1. Click in the combo box of the **Contacts** dialog. The list of already existing address groups is displayed.
2. Select here the **Edit** feature. The **General settings** dialog opens. You can already see the **Address groups** tab.
3. Select the address group that you want to delete.
4. Click on the **Delete address group** icon. The address group will be removed from the list.
5. Press the **OK** button. Your modification is saved and the **General settings** dialog closed.

Renaming an address group

1. Click in the combo box of the **Contacts** dialog. The list of already existing address groups is displayed.
2. Select here the **Edit** feature. The **General settings** dialog opens. You can already see the **Address groups** tab.
3. Select the address group that you want to rename.
4. Click the address group name or the icon **Rename address group** . The cursor appears in the name entry.
5. Change the address group name.
6. Push the enter key. The changed name is copied.
7. Press the **OK** button. Your modification is saved and the **General settings** dialog closed.

NOTE: When you complete the renaming with **OK**, the address group will be modified in all data records that access it.

3.5.10 Contacts

The **Contacts** dialog provides an expanded view of the **Contacts (compact)** window. The contact entries of the journals additionally display the **Department** and **Company** information.

Furthermore you find a combo box with the additional feature **Go to** in the toolbar of this dialog.

You can use the **Go to** feature for navigating in the contact entries, for example if not all entries can be displayed in the journal.

How to use the **Go to** feature:

1. Enter a complete name or the initials of a name in the **Go to** entry line.
2. Push the enter key.

   The result of this action is:

   - The contact entry with the entered name appears as top entry in the contact journal.
   - The found contact is automatically selected and highlighted.

3.5.11 Shared Address Books (optional)

The **Shared Address Books** function window lets you access the shared address books. The address books comprise those you have created to share with other users and those that other users share. So that you can access the address books other users share, you must have been granted the corresponding privilege by these users.

To open a shared address book, click on the small triangle next to the combo box in the caption bar. Then select the address book you wish to open from the list.

The **Shared Address Books** function window displays the following information about every listed contact (from left to right):

- A checkbox for selecting the entry.
- The name.
- The workstation phone number.
- An icon that allows sending an e-mail to this contact .

NOTE: An e-mail address must exist in the contact information for this purpose.

- An icon that allows making a call to this contact .

The operating options of the **Shared Address Books** function window are described in Section 3.5.9.1, “Operating Options of the Contacts Window”, on page 81.

3.5.12 All Address Books (optional)

The **All Address Books** function window lets you access:

- The contacts of your contact list (indicated as **speed-dial list**).
- All shared address books you may access.

To open one of these address book, click on the small triangle next to the combo box in the caption bar. Then select the address book you wish to open from the list.

The **All Address Books** function window displays the following information about every listed contact (from left to right):

- A checkbox for selecting the entry.
- The name.
- The workstation phone number.
- An icon that allows sending an e-mail to this contact .

> ***NOTE:*** An e-mail address must exist in the contact information for this purpose.

- An icon that allows making a call to this contact .

The operating options of the **All Address Books** function window are described in Section 3.5.9.1, “Operating Options of the Contacts Window”, on page 81.

3.5.13 Redirect Call

You can rout a call automatically to another device if you are absent from your workstation. Incoming calls will then not get lost and callers can still reach a conversational partner.

In the **Forwarding** dialog you can select three options via combo boxes for a call forwarding:

- **Activate rule profile**
  When using this option you can determine via selection of a rule profile you have created how an incoming call should be handled. See Section 3.7, “Rule Profile – Handling Calls with Rules”, on page 133.

  NOTE: Please note that the **Forward calls to** option is higher prioritized than a call forwarding by a rule profile. When configuring a call forwarding a warning may point to this fact.

- **Forward calls to**
  Using this option you can forward a call to any of those numbers you have defined under **menu > General > Common > Forwarding**. In this configuration dialog you can also link a call forwarding to specific status conditions.

  NOTE: This feature is only available for specific PBXs.

3.5.14 Directory Search

The directory search facilitates looking for a contact. The search takes place in all configured address books.

NOTE: You can also use the extended directory search as alternative. The extended directory search is the method to apply if the directory search delivers too many hits, as you can narrow down the search via search criteria. The journal view that displays the hits is identical with the one for the directory search. The additional features for the extended directory search are described in Section 3.5.15, “Directory Search (extended)”, on page 94.

The directory search window displays the following information for each contact found (from left to right):

- A checkbox for selecting the entry.
- The contact name.
- The department if contained in the address book.
- The phone number.
- An icon that allows sending an e-mail to this contact .
- An icon that allows making a call to this contact .

The following features are provided via the toolbar:

- To integrate the found user in your contact directory, select him/her in the search list and click on the **Add as new user entry to the address book** icon. This user's data is added to your contact list.
- To delete a contact entry, select it. Then click the **Delete user entry** icon. If you want to delete several contact entries simultaneously, select the corresponding entries and click on **Delete Contact**. You can make a selection via **Ctrl** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.

  NOTE: Depending on the address book in which the contact was found, you cannot delete the entry. The icon is inactive in this case.

- To edit a contact entry, select it and click on the **Edit contact** icon. The contact entry mask with the already available data opens. How to edit a contact entry is described in Section 3.5.9.3, “Editing Contact Entries”, on

page 85.

NOTE: Depending on the address book in which the contact was found, you cannot edit the entry. The icon is inactive in this case.

- To view the information available for a journal entry, select the corresponding call from the journal. Then click the **Show Contact Information** icon. The data for this entry are displayed in a separate window.
- To locally store the found journal entries on your computer, click on the **Save addresses** icon. A new window opens that displays the found contact data in table form. In this window select **File > Save As**. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
- To print the found journal entries, click the **Print address book** icon. The journal information is printed out in table form.
- To delete all entries in the **Search** field, click on the **Refresh** icon.
- **Search** entry field
Specify here the last name or initial letter of the contact you want to find.

NOTE: If, for example, you look for a contact named Baumann, the entry *Ba* will display contact *Baumann*. All other contacts whose names begin with *ba* will also be displayed as hits.

- To initiate the search process, click on the **Start search** icon.

3.5.15 Directory Search (extended)

If the directory search delivers too many hits meaning that most of them are useless, you can use the extended directory search. You can use the search mask displayed here and further search criteria to considerably restrict the number of hits.

Start the extended directory search via the **Search** button after you have entered the search criteria in the mask. Set the **Exact match** option if only hits are to be displayed that match the search criteria by 100 %.

The search results are displayed in the journal. If not all search results can be displayed in the window, click on the ⊞ expansion icon to stretch the window to the browser size.

The control elements for the extended directory-search

The control elements of the extended directory search serve the following purpose:

Control element	Function
Name, **First name**, **Department**, **Company**, **Phone**	Criteria to find a contact. Specify here the information you know about the contact you look for.
Address group	If you have grouped your contacts in address groups, you can enter here the address group of the contact you look for. Address groups may be e.g.: Private, Supplier, Customer, etc.
Address book	Specify here the address book in which you want to search.
Max. number	Specify here how many hits are to be displayed in the journal.
Exact match	You can set this checkbox to only display the contacts who exactly correspond to the entered criteria. ***Note:*** If you set this option, the entry *Ba* in the **Name** search field will only deliver a result if the contact's name is exactly Ba. If you do not set this option, all contacts whose name begins with Ba will be displayed.
Search	Start the search process by clicking the **Search** button.

The extended-directory-search window displays the following information for each contact found (from left to right):

- A checkbox for selecting the entry.
- The contact name.
- The department if contained in the address book.
- The phone number.
- An icon that allows sending an e-mail to this contact.
- An icon that allows making a call to this contact.

- To integrate the found user in your contact directory, select him/her in the search list and click on the **Add as new user entry to the address book** icon. This user's data is added to your contact list.
- To delete a contact entry, select it. Then click the **Delete user entry** icon. If you want to delete several contact entries simultaneously, select the corresponding entries and click on **Delete Contact**. You can make a selection via **Ctrl** + clicking the journal entry or by activating the checkbox that precedes the relevant journal entry.

NOTE: Depending on the address book in which the contact was found, you cannot delete the entry. The icon is inactive in this case.

- To edit a contact entry, select it and click on the **Edit contact** icon. The contact entry mask with the already available data opens. How to edit a contact entry is described in Section 3.5.9.3, "Editing Contact Entries", on page 85.

NOTE: Depending on the address book in which the contact was found, you cannot delete the entry. The icon is inactive in this case.

- To view the information available for a journal entry, select the corresponding call from the journal. Then click the **Show Contact Information** icon. The data for this entry are displayed in a separate window.
- To locally store the found journal entries on your computer, click on the **Save addresses** icon. A new window opens that displays the found contact data in table form. In this window select **File > Save As**. The directory selection dialog of Windows opens. Select here the directory as well as the file type and specify the file name under which the address list is to be stored.
- To print the found journal entries, click the **Print address book** icon. The journal information is printed out in table form.
- To delete all entries in the search mask, click on the **Refresh** icon.
- **Exact match** checkbox
  Set this option if only contacts who exactly match your search criteria are to be displayed.
- To initiate the search process, click on the **Search** button.

3.5.16 Showing Bookmarks

In this dialog you can default bookmarks or open internet pages via bookmarks already specified. In this way you can directly operate the internet from the *OpenScape Web Client*.

The following features are provided in this dialog:

- To add a new bookmark to the list, click on the **Create bookmark** icon. The **Bookmark Settings** dialog opens. See Section 3.5.16.1, “Add New Bookmark”, on page 97.
- To remove a bookmark from the list, select the corresponding list entry and click on the **Delete bookmark** icon. The bookmark will be removed from the list.
- To edit a bookmark entry, select the corresponding list entry and click on the **Edit bookmark** icon. The **Bookmark Settings** dialog opens with the already available settings. Here you can edit the settings for the selected bookmark. See Section 3.5.16.1, “Add New Bookmark”, on page 97.

  After you have completed the editing, the data will be saved after a click on **OK** and the **Bookmark Settings** dialog closes.
- To open an internet page via an already existing bookmark, select the corresponding list entry and click on the **Open bookmark** icon. The corresponding internet page opens in a separate browser.

  You can also open the internet page by clicking the dot that precedes the list entry.
- To print a list with bookmarks, click on the **Print bookmarks** icon. The print preview window with the bookmarks list opens,

  showing the following information:

  – Display name

  – Description

  – Bookmark URL

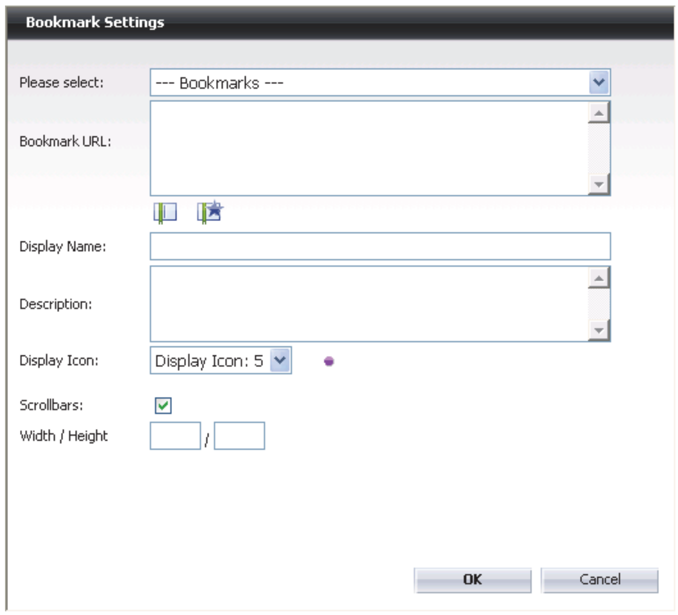
  – Width/Hight

  Click on the **Print** button to print the journal list with the bookmarks.

3.5.16.1 Add New Bookmark

The **Bookmark Settings** dialog opens for creating a new bookmark or editing an existing one:

- as empty dialog when creating a new bookmark
- as dialog that contains the settings of an existing bookmark if you want to edit them.



The following settings can be performed:

Field name	Description
Please select	You can use this combo box to select a bookmark for editing.
Bookmark URL	Enter the internet address of the page that you want to save as bookmark. Example: http://www.company.com
 **Preview**	Displays the internet page specified under **Bookmark URL** as preview.
 **Add to Favorites**	Adds the internet page specified under **Bookmark URL** to the favorites in your browser. The option opens the favorites management of your browser so that you can store the internet page in the desired place.
Display name	Enter here a name under which this bookmark will be listed in the journal.
Description	Enter here a short descriptive text about the bookmark. This text will also be displayed in the journal entry for this bookmark.
Display Icon	Select an icon for this bookmark. A click on this icon opens this internet page in a separate browser.

Field name	Description
Scrollbars	If this option is set, vertical and horizontal scrollbars that may exist are displayed in the browser. If you do not want to use scrollbars, you can hide them by disabling this option.
Width/Hight	Here you can default the size of the browser in which the internet page opens. Useful values for this setting range between 500 and 1000, respectively for width and hight. Once the browser is open, you can bring the screen to any size by dragging the frame.

After you have performed all settings, the following operating options are possible:

- Click on the **OK** button to save your settings and close the **Bookmark Settings** dialog.
- Click on the **Cancel** button to close the **Bookmark Settings** dialog without saving the settings already performed.

3.5.17 Feature View (compact)

This window provides a combo box that is named after the respective function dialog that you can open via this combo box. The combo box is then named after the window currently displayed.

With a click on the combo-box and selecting the corresponding window you can represent the following function windows here:

- Missed calls
- Journal (all calls)
- Conferences
- Contacts
- Forwarding
- Directory search
- Bookmarks

3.6 General Settings

You perform the basic configuration of *OpenScape Web Clients* via the general settings. The general settings are combined in three groups:

- **Common**
  With the basic settings for your *OpenScape Web Client*.
- **Addresses**
  Settings to import address data from other directories.
- **Team (optional)**
  For managing your team settings.

You reach the general settings via the main menu by invoking **menu > General**.

3.6.1 Common

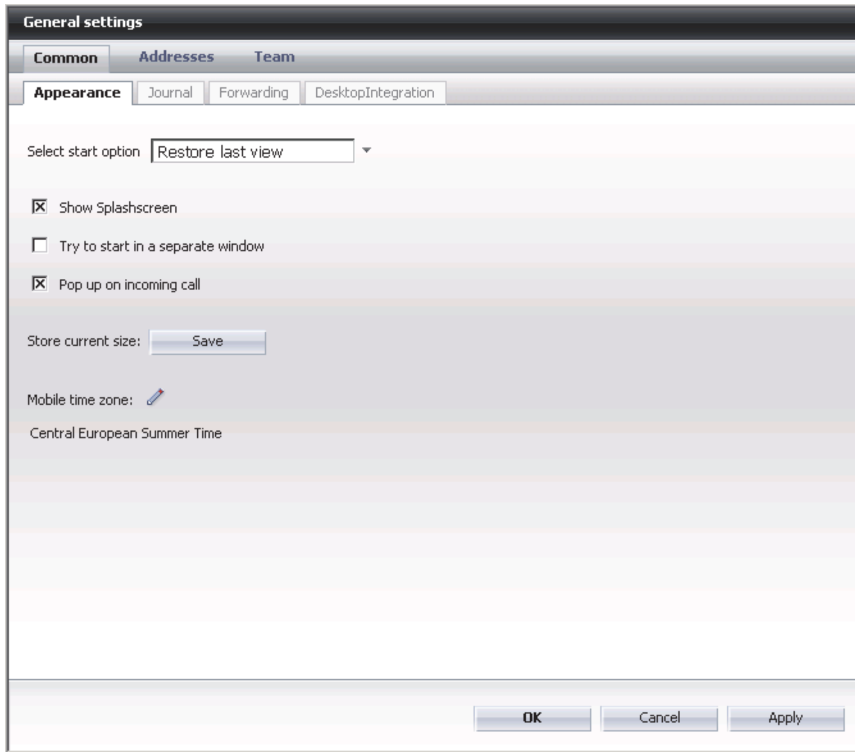
In the **Common** dialog you perform the basic settings for working with the *OpenScape Web Client*. You reach this dialog via **menu > General > Common**.

In the **Common** dialog you find three tabs on which you can access the settings for the following areas:

- **Appearance**
  On this tab you perform the *OpenScape Web Clients* interface settings.
- **Journal**
  On this tab you perform the settings for logging calls and for the missed-call notifications.
- **Forwarding**
  On this tab you perform the call forwarding settings.
- **DesktopIntegration**
  Using the information you find on this tab you can install a small program that allows calling a subscriber from any application.
  Example: A Word document you have opened contains a phone number. Select this phone number in the text and enable the hotkey. A call to this number is immediately initiated.

3.6.1.1 Appearance

On the **Appearance** tab you perform the *OpenScape Web Client* interface settings. You reach this setting dialog via **menu > General > Common > Appearance** tab.



You can perform the following settings to represent the *OpenScape Web Client* interface:

- **Select start option**
  Using this combo box you can specify the look of the *OpenScape Web Client* interface at the application start. The following settings are available:
  - **Restore last view**
    The *OpenScape Web Client* opens with the view that was set the last time you quit the application.
  - **Large view**
    The *OpenScape Web Client* opens with a two-column view.
  - **Large view**
    The *OpenScape Web Client* opens with a two-column view.

– **Compact view**
  The portal view of the *OpenScape Web Client* is set to tab view.

NOTE: The compact view is not displayed until the setting has been saved and the browser updated.

The following options are all selectable via checkboxes:

- **Show Splashscreen**
  Displays the splashscreen after the *OpenScape Web Client* has started. Without any further user action the *OpenScape Web Client* is displayed in the currently open browser window. With a click on the splashscreen the *OpenScape Web Client* is displayed in a separate window.
- **Try to start in a separate window**
  When you select this option, the *OpenScape Web Client* is displayed in an individual window if possible.
- **Pop up on incoming call**
  If the *OpenScape Web Clients* window is placed in the background and thus hidden by other applications, you can set this option to make the *OpenScape Web Client* move to the foreground when a call comes in.
- **Store current size**
  A click on the **Save** button stores the current window size. The *OpenScape Web Client* then starts with this stored window size the next time it is booted.
- **Mobile time zone**
  Click on the **Mobile time zone** icon to set the time zone to be displayed in the journals. This is useful when you are in a different time zone and work with the *OpenScape Web Client* from there. The event time is then displayed in the local time of the set time zone. The ID of the time zone is additionally displayed in call journals under **Date**.

NOTE: In the call journals you can use the **Toggle time (mobile time zone)** icon to toggle the local time zone and the additionally selected time zone. The tooltip for this icon indicates in the clear text which time zone you have selected after the time zone switch.

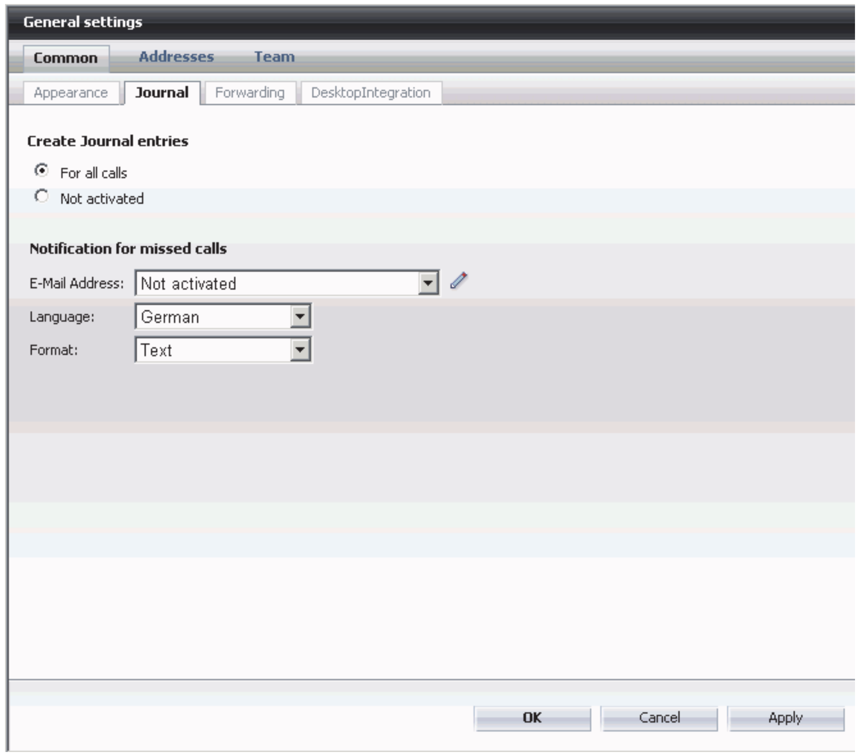
After you have completed your settings, you can use the following operating options:

- Click on the **Apply** button to save your settings without closing the **General Settings** dialog.
- Click on the **OK** button to save your settings and close the **General Settings** dialog.

- Click on the **Cancel** button to close the **General Settings** dialog without saving the settings already performed.

3.6.1.2 Journal

On the **Journal** tab you perform the settings for creating the journal entries and for the notification feature. You reach this setting dialog via **menu > General > Common > Journal** tab.



The following options are available:

Create Journal entries

Select one of the following options for your journals:

- **For all calls**
  Creates journal entries for all calls
- **Not activated**
  Disables the creation of journal entries.

Notification for missed calls

NOTE: This feature can only be used if *OpenScape Xpressions* is configured accordingly.

Here you can specify where and in which format a notification for missed calls shall be sent.

- **E-Mail Address**
  Use this combo box to specify whether a notification shall be sent respectively to which e-mail address it shall be sent. You can edit the list of e-mail addresses (adding, modifying or deleting e-mail addresses), by clicking on the **Edit** icon.

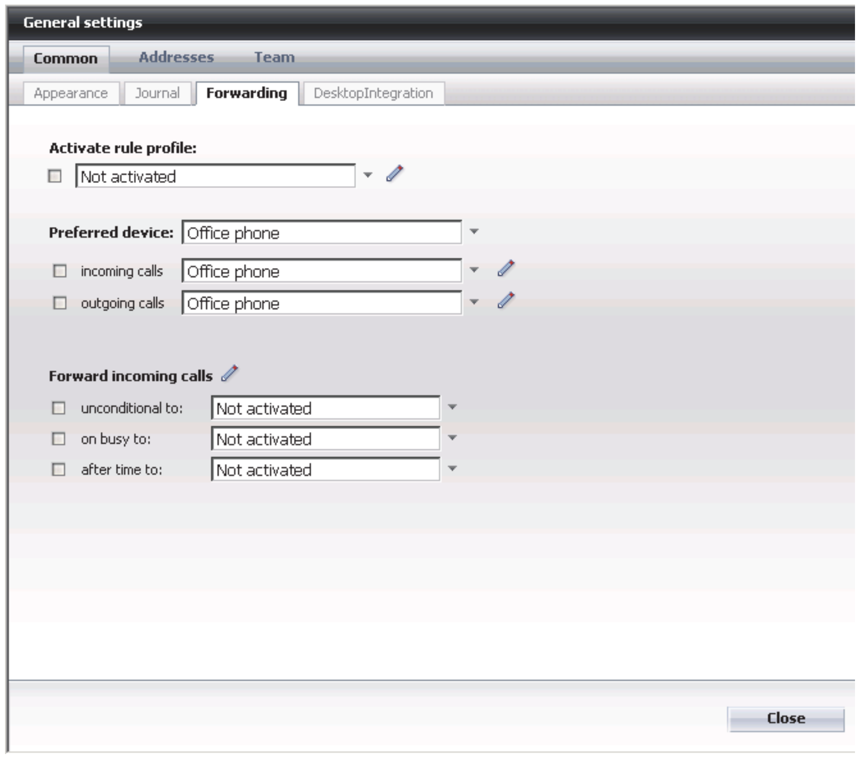
- **Language**
  Use this combo box to select the notification language.

- **Format**
  Use this combo box to specify the notification format. The following formats are provided:

Format	Description
HTML (default)	The advantage of this format is that it integrates a button in the notification via which the originator can be immediately called. ***Note:*** If you want to use this feature, the following requirements must be met on the mail client on which the notification is received: The mail client must support the HTML format and JavaScript must be active.
Text	In the case of the Text format the pure notification text is transmitted only. Instead of the return call button a link is contained for a requested return call.
SMS format	The SMS format is a pure text format as well. But since the size of a cell phone display is very limited, the notification is used here in short form.

3.6.1.3 Forwarding

On the **Forwarding** tab you perform the settings for the call forwarding. You reach this setting dialog via **menu > General > Common > Forwarding** tab.



The following options are available:

Activating a rule profile

If you want to configure the call forwarding according to a rule profile you have defined, select the corresponding rule profile via the combo box. If you want to edit the rule profiles (adding, modifying or deleting), you can click on the **Edit** icon to open the **Rules** dialog for direct editing.

How to specify a rule profile for call forwarding is described in Section 3.7, “Rule Profile – Handling Calls with Rules”, on page 133.

NOTE: Please note that the call forwarding may pose problems if you configure other forwarding options in addition. In this case an error message will inform you.

Click on the **Close** button to save your settings and close the **Forwarding** tab.

Forward incoming calls

Three further combo boxes are available to specify conditions for the call forwarding to other devices.

You configure the forwarding destinations by enabling the **Edit** icon. This opens the **Edit list of call forwarding destinations** dialog. How to define new forwarding destinations:

1. Assign a meaningful name to the forwarding destination using the **Display name** entry line. The forwarding destination will then be itemized under this name in the list of configured forwarding destinations.
2. Specify the phone number of the forwarding destination in the **Phone** entry line.
3. Click on the **Apply** button to integrate the forwarding destination in the list of configured forwarding destinations.
4. Repeat steps 1. to 3. if you want to define further forwarding destinations.
5. Click on **OK** to save your settings or on **Cancel** to dismiss them. The Edit list of call forwarding destinations dialog closes.

How to edit an existing forwarding destination :

1. Open the **Edit list of call forwarding destinations** dialog with a click on the **Edit** icon.
2. Click on the **Edit entry** icon of the entry you want to modify. The data of this entry appear under **Display name** and **Phone**.
3. Change the data under **Display name** and **Phone**.
4. Click on **OK** to save your settings or on **Cancel** to dismiss them. The Edit list of call forwarding destinations dialog closes.

How to delete an existing forwarding destination :

1. Open the **Edit list of call forwarding destinations** dialog with a click on the **Edit** icon.
2. Click on the × **Delete entry** icon of the entry you want to remove. The entry is removed from the list of configured forwarding destinations.
3. Click on **OK** to save your settings or on **Cancel** to dismiss them. The Edit list of call forwarding destinations dialog closes.

The following conditional forwardings are possible:

- **unconditional to**
  Use this combo box to select the device that is forwarded to if the forwarding is to occur without condition.

- **on busy to**
  Use this combo box to the select the device that is forwarded to if your office phone is engaged.

  NOTE: This feature is only available for specific PBXs.

- **after time to**
  Use this combo box to select the device that is forwarded to if the specified ring time of the device is exceeded.

  NOTE: This feature is only available for specific PBXs.

Click on the **Close** button to save your settings and close the **Forwarding** tab.

3.6.1.4 *DesktopIntegration*

NOTE: To use the *DesktopIntegration* you need to deploy a Microsoft operating system on your workstation.

Using the information on the **DesktopIntegration** tab of the *OpenScape Web Client* you can install a small program on your workstation that allows calling a subscriber from any application.

An example:
A Word document you have opened contains a phone number. Select this phone number in the text and enable the hotkey you have defined for this purpose. A call to this number is immediately initiated.

In addition, incoming calls are signalled via the *DesktopIntegration* application even if the window of the *OpenScape Web Client* is closed.

In the *DesktopIntegration* application you can set further options for the startup behavior, the *OpenScape Web Client* display and the notification options.

NOTE: You can use this application program irrespectively of whether or not the *OpenScape Web Client* is started.

You reach this setting dialog via **menu > General > Common > DesktopIntegration** tab.

Application requirements

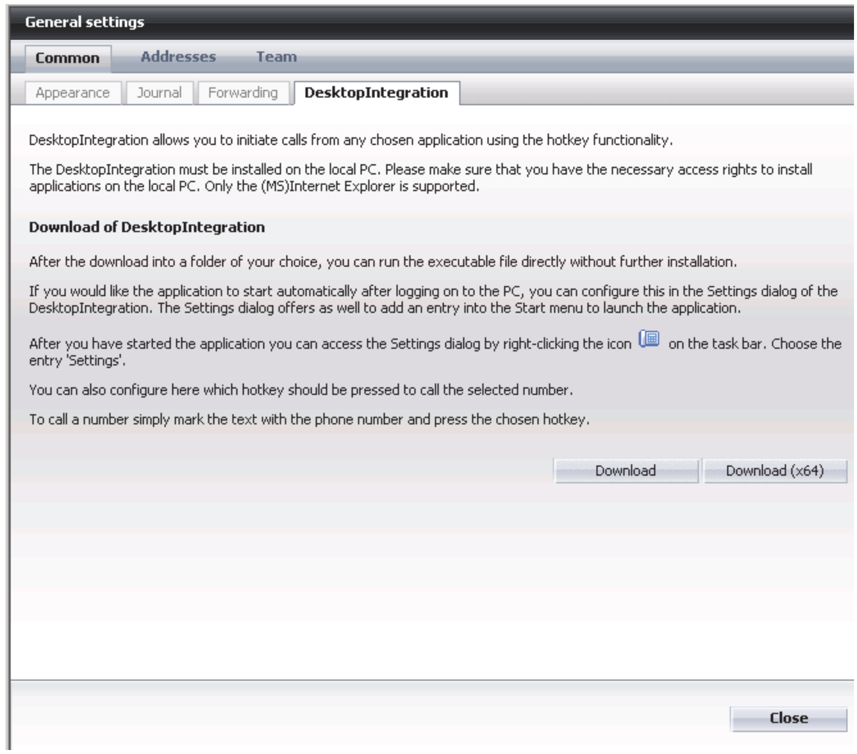
Please note the following requirements for using the *DesktopIntegration*:

- You can use the *DesktopIntegration* with a Microsoft operating system only.
- If you want to use the *DesktopIntegration*, be sure to download the application via the *OpenScape Web Client* that you normally use for the *OpenScape Web Client*.

Installing the *DesktopIntegration*

How to install the *DesktopIntegration* application program:

1. Start the *OpenScape Web Client*.
2. Open the **DesktopIntegration** tab. You reach this setting dialog via **menu > General > Common > DesktopIntegration** tab.



3. Click the **Download** button on the **DesktopIntegration** tab for use on a 32-bit operating system or **Download (x64)** for use on a 64-bit operating system. The file-download dialog opens.
4. Enable here the **Save** button. The file-selection dialog for storing files opens.
5. Save the `XPRwebDI.exe` file in a directory of your choice. When this process is accomplished, the **Download complete** dialog opens to inform you accordingly.
6. In this dialog enable the **Open** button to start the application. The directory in which you have stored the `XPRwebDI.exe` file opens.
7. Doubleclick `XPRwebDI.exe`. The application starts.
   After the start the task bar features the icon.
8. Rightclick the icon in the task bar to invoke the setting pages for this application and other options.

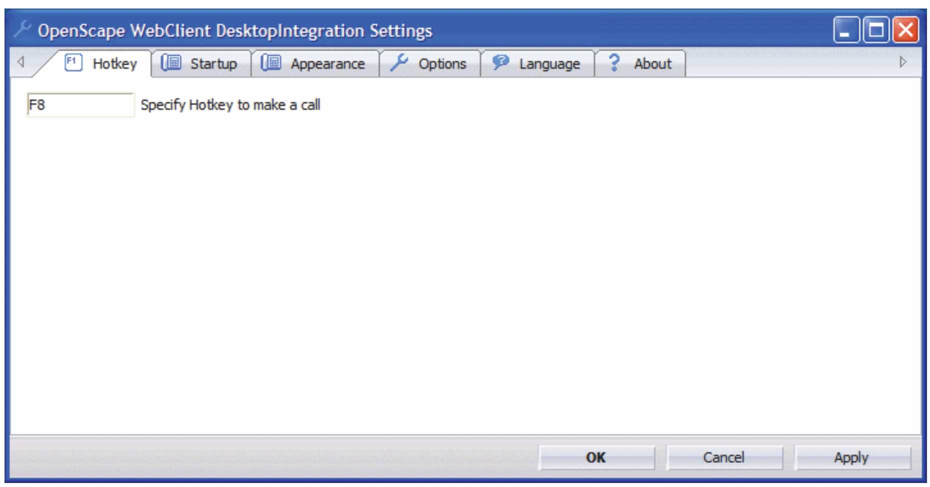
Operation and settings of the *DesktopIntegration*

The following features are available in the context menu of the *DesktopIntegration*:

- **Dial: [*abcxyz*]**
  You can use this feature to dial a phone number saved to the clipboard.

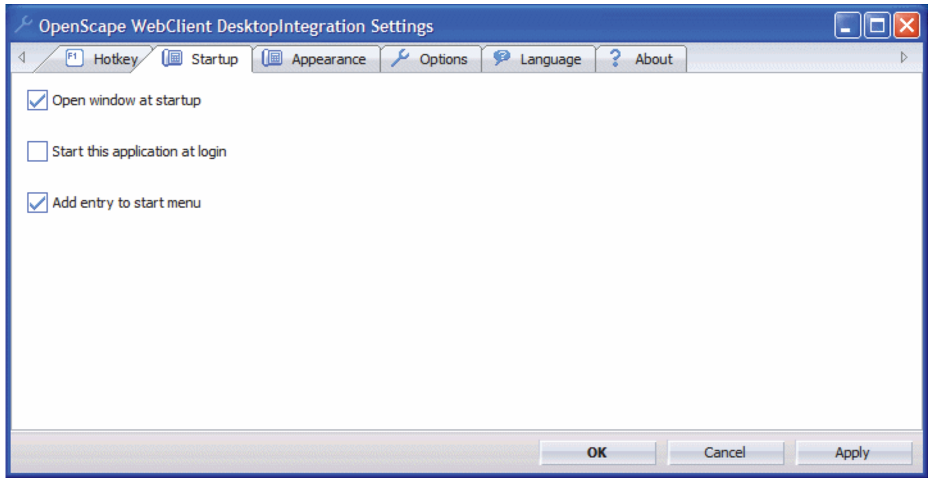
  NOTE: This feature is only available if something has been saved in the clipboard.

- **Open**
  You can use this feature to start the *OpenScape Web Client* in an individual browser window.
- **Settings**
  Opens the settings dialog to configure the *DesktopIntegration* program.
  - **Hotkey**



On the **Hotkey** tab you determine the key command that triggers the feature of calling the phone number saved to the clipboard. Click in the appropriate entry field and enable the desired *F-key*> or *Ctrl* + *F-key*>.

– **Startup**



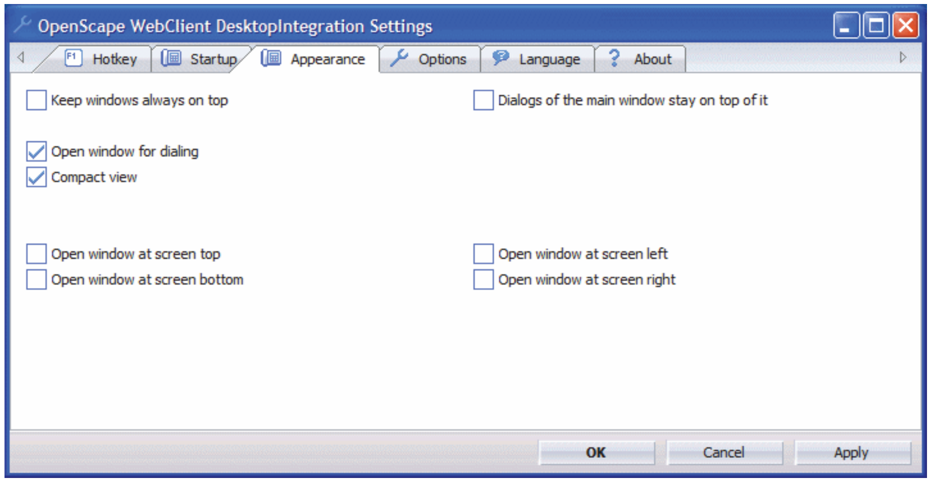
On the **Startup** tab you define the startup behavior of the *DesktopIntegration* program. The following startup options are available individually or in combination:

– **Open window at startup**
Select this option to define that the *OpenScape Web Client* is automatically started when you boot the *DesktopIntegration* program.

– **Start this application at login**
Select this option to define that the *DesktopIntegration* program is started when you log on to your operating system.

– **Add entry to start menu**
You select this option to determine that an entry is created in the start menu of your user account when the application starts. Subsequently, the application is started automatically each time you log on to the system.

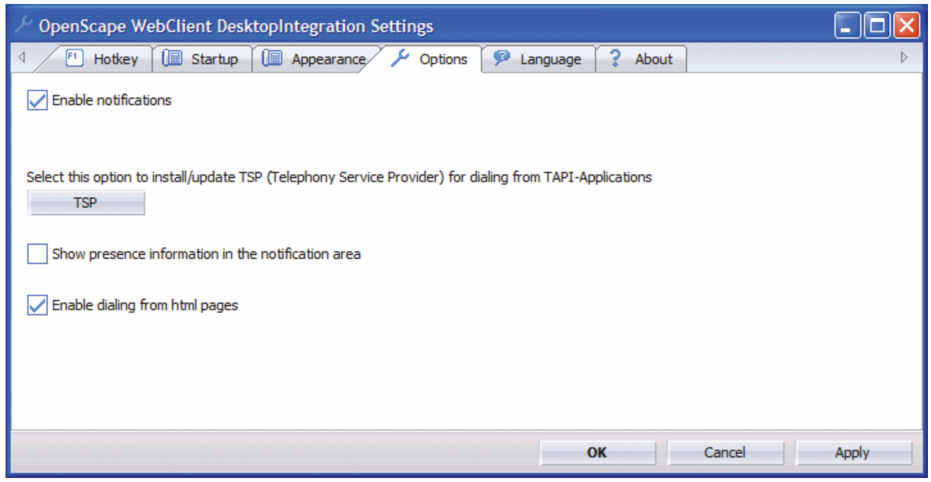
– **Appearance**



On the **Appearance** tab you define the representation mode for the *OpenScape Web Client* window. The following options are available:

- **Keep windows always on top**
  Select this option to define that the *OpenScape Web Client* window is always on top of all application windows.
- **Dialogs of the main window stay on top of it**
  This setting determines whether newly opened dialog windows can be covered by the main window.
- **Open window for dialing**
  This setting opens the user interface (OpenScape Web Client and/or OpenScape Desktop Client Enterprise Web Embedded Edition) if a number is dialed via the hotkey feature.
- **Compact view**
  This setting opens the compact view of the user interface with the call control if a number is dialed via the hotkey feature.
- Positioning of the *OpenScape Web Client* on the screen:
  Open window at screen top
  Open window at screen bottom
  Open window at screen left
  Open window at screen right

– **Options**



On the **Options** tab you can perform the following settings:

– **Enable notifications**
In this settings dialog you can disable the notifications that are always active by default with a click on the check box.
The following notifications are active by default:
Enable notification on incoming call
When a call comes in you are notified by a desktop flash.
Enable notification on new instant message
When an instant message comes in you are notified by a desktop flash.

– **Select this option to install/update TSP (Telephony Service Provider) for dialing from TAPI Applications** (Telephony Application Programming Interface).
Using this application you can directly call a subscriber from Microsoft Outlook via journal entries. Mark the appropriate journal entry and select **Actions > Call Contact** from the Microsoft Outlook menu.

NOTE: The journal entry must refer to a phone number via the database for this purpose.

You can use the TSP button to update this service provider manually or to install it if required.

– **Show presence information in the notification area**
This option is unavailable.

– **Enable dialing from html pages**
Selecting this option releases the function to dial a phone number deposited on a specially prepared HTML page.
The phone number must have been integrated via an HTML command according to the following pattern:

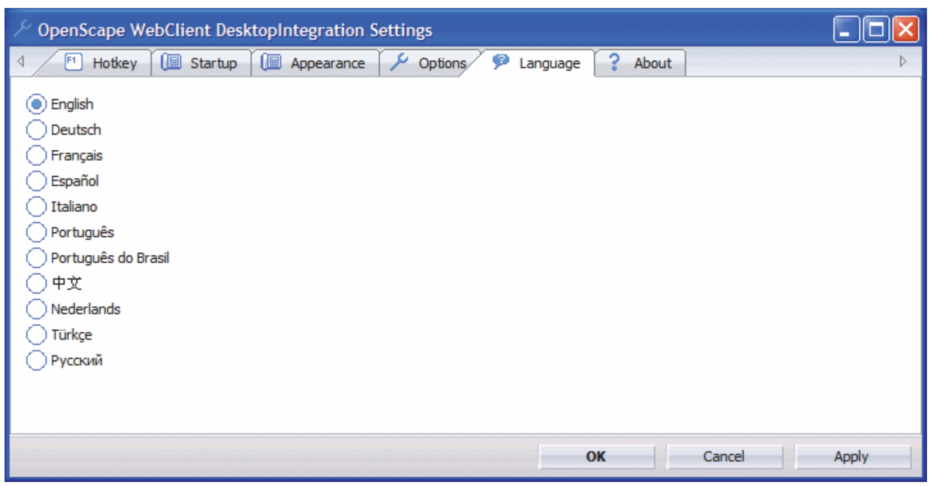
```
<a href="clicktodial:<phone number>"><html display></a>
```

Example:
To integrate phone number “123456789” in an HTML page via the link “Sales”, the following command line must be entered in the source code in the position where the link shall appear:

```
<a href="clicktodial:123456789">Sales</a>
```

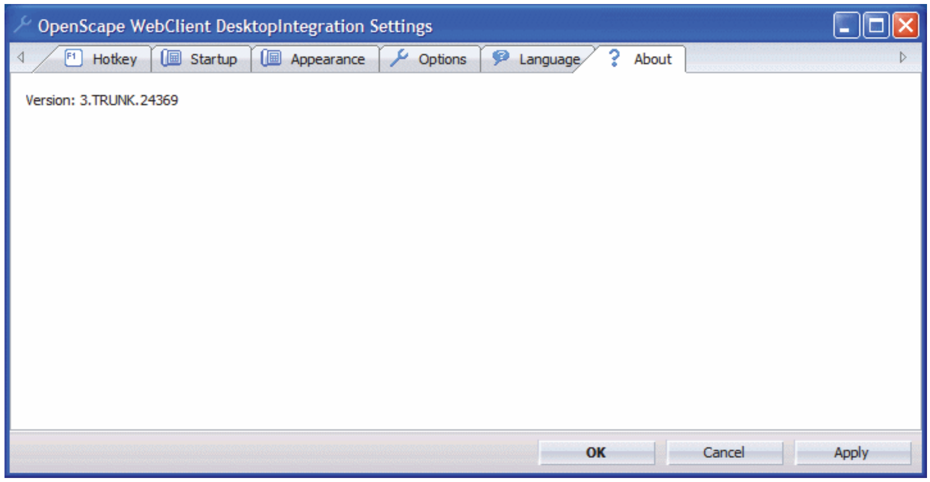
The link "Sales" is inserted in the HTML page for dialing phone number "123456789" directly.

– **Language**



Select one of the defaulted languages to set it for menus and info texts. For the time being, the following languages can be selected: English, German, French, Spanish, Italian, Portuguese (Portugal), Portuguese (Brazil), Dutch, Turkish and Russian.

– **About**



On this tab you see the version number of the currently installed version of the *DesktopIntegration* program.

-  **Disable hotkeys**
  A click on this icon disables the hotkey feature even if the application is started.

-  **Exit**
  A click on this icon closes the *DesktopIntegration* program.

3.6.2 Addresses

The **Addresses** dialog serves for administering your address data with the *OpenScape Web Client*. You reach this dialog via **menu > General > Addresses**.

In the **Addresses** dialog you find four tabs on which you can access the settings for the following areas:

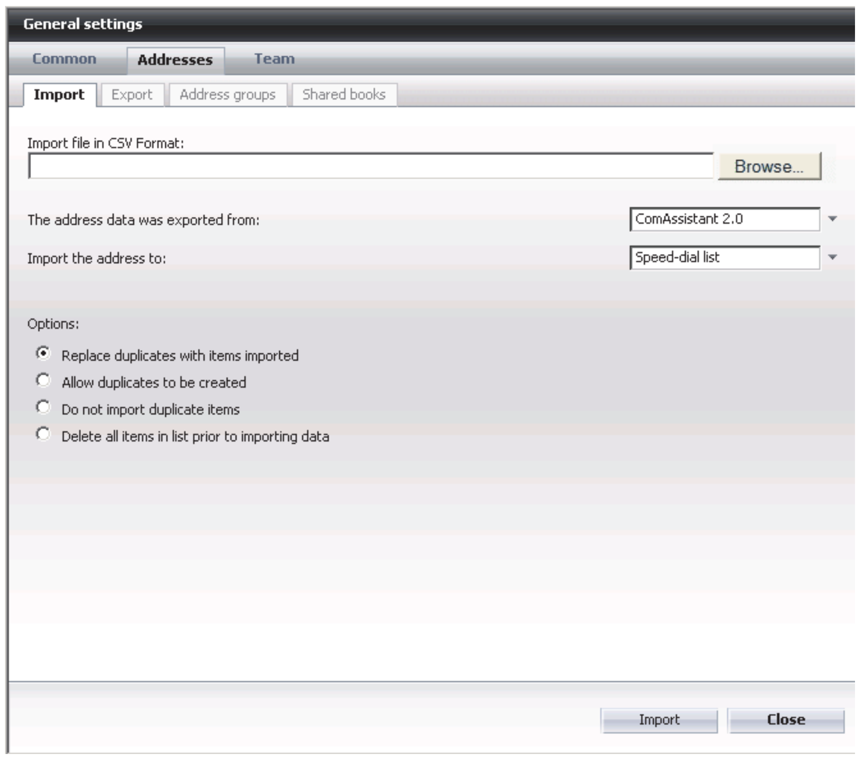
- **Import**
  On this tab you perform the address import settings.
- **Export**
  On this tab you perform the address export settings.
- **Address Groups**
  On this tab you specify the groups for your contact administration.
- **Shared Address Books (optional)**
  On this tab you create new shared address books and grant the privileges for accessing your shared address books.

3.6.2.1 Import

NOTE: Using this feature requires a project-specific configuration. This is not possible for Microsoft Outlook 2010.

Via the **Import** tab you can import address data from other address books.

You reach this setting dialog via **menu > General > Addresses > Import** tab.



How to import address data:

1. Use the file selection to pick the file that you want to import. To this, either enter the path plus file name in the **Import file (in CSV Format**[1]**)** field or select the file via the file selection by pushing the **Browse** button.

NOTE: The extension of the import file must not necessarily read `.csv`. The import files are usually text files with the extension `.txt`.

---

1. CVS format means Comma Separated Values

2. Use the **The address data was exported from** combo box to specify the source from which the data are to be obtained.

NOTE: So that the data can be correctly imported it is necessary to know from which data source the import file was created. If you are not sure about the data source or if you cannot find the correct file format, please consult your system administrator.

The following import formats are supported for a data import:

Import formats	Remark
ComAssistant 1.0/S	The address data must have been previously exported from the *ComAssistant 1.0* and be locally accessible.
ComAssistant 2.0	The address data must have been previously exported from the *ComAssistant 2.0* and be locally accessible.
LotusNotes Format	The address data must have been previously exported from *Lotus Notes* and be locally accessible.
MS Outlook Brazilian	The address data must have been previously exported from a Brazilian *MS Outlook* and be locally accessible.
MS Outlook Chinese	The address data must have been previously exported from a Chinese *MS Outlook* and be locally accessible.
MS Outlook German	The address data must have been previously exported from a German *MS Outlook* and be locally accessible.
MS Outlook English	The address data must have been previously exported from an English *MS Outlook* and be locally accessible.
MS Outlook French	The address data must have been previously exported from a French *MS Outlook* and be locally accessible.
MS Outlook Italian	The address data must have been previously exported from an Italian *MS Outlook* and be locally accessible.
MS Outlook Portuguese	The address data must have been previously exported from a Portuguese *MS Outlook* and be locally accessible.
MS Outlook Spanish	The address data must have been previously exported from a Spanish *MS Outlook* and be locally accessible.

3. Select the address book in which you wish to import the address data in the **Import the address to** combo box. You can select:
   – The speed-dial list
   – One of the available shared address books.
4. Set one of the following import options for the import:
   – **Replace duplicates with items imported**
   – **Allow duplicates to be created**
   – **Do not import duplicate items**
   – **Delete all items in list prior to importing data**

   NOTE: Duplicates refer mostly to the matching of names and phone numbers. If no phone numbers are available, the e-mail addresses are used to identify duplicates. For all other data new data records are created; they will not be searched for duplicates.

5. Click on the **Import** button to start the import process. The system accepts the import job and queues it in its job list.

   NOTE: If you want to abort the import process so that no import is performed, push the **Close** button. The process is terminated and the **General settings** dialog closed.

6. Complete the import by clicking on the **Close** button. The **General settings** dialog closes.

The address data import is now complete.

NOTE: As soon as the import is being performed by the system, your contact list will be inaccessible for a short time. If you try to access the contact list during this short period, a message will inform you accordingly. After the import process you can work with your contact list as usual.

3.6.2.2 File Exchange Formats

File exchange via the CSV format

To exchange files between different databases, a text file is usually deployed in which the single elements are separated by commas. These file are called CSV (Comma Separated Value) files. This format is automatically generated upon a data export.

The service that prepares the address data for your contact list has an interface that can process this data format, thus enabling the import and export of address data.

Specialties when importing and exporting with *Lotus Notes*

Please heed the following to ensure a smooth data exchange between *Lotus Notes* and the *OpenScape Web Client*:

- Export from *Lotus Notes*:
  - For the file export from *Lotus Notes* select the Structured Plain Text format.
  - Select the **All documents** export option to export all contacts.
- Import to *Lotus Notes*:
  - Select Structured Text as import format.

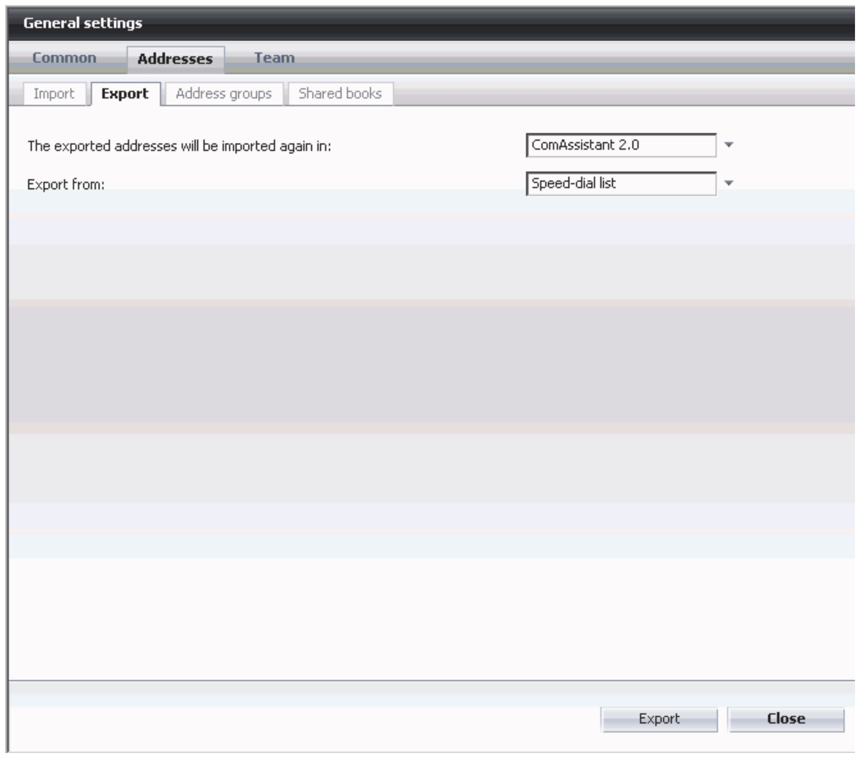
    NOTE: The file to be imported must not have a file extension. Otherwise, the “Structured Text” option cannot be selected.

  - Import the file as “Main Document”.

3.6.2.3 Export

NOTE: Using this feature requires a project-specific configuration. This is not possible for Microsoft Outlook at Exchange Server 2010.

Via the **Export** tab you can export address data in specific file formats for other applications. You reach this setting dialog via **menu > General > Addresses > Export** tab.



How to export address data:

1. Select the desired file format via the **The exported addresses will be imported again in** combo box.

   The following export formats are supported for a data export:

Export formats	Remark
ComAssistant 1.0/S	For generating a file with address data that can be imported in the *ComAssistant 1.0*.
ComAssistant 2.0	For generating a file with address data that can be imported in the *ComAssistant 2.0*.
LotusNotes Format	For generating a file with address data that can be imported in *Lotus Notes*.
MS Outlook Brazilian	For generating a file with address data that can be imported in a Brazilian *MS Outlook*.

Export formats	Remark
MS Outlook Chinese	For generating a file with address data that can be imported in a Chinese *MS Outlook*.
MS Outlook German	For generating a file with address data that can be imported in a German *MS Outlook*.
MS Outlook English	For generating a file with address data that can be imported in an English *MS Outlook*.
MS Outlook French	For generating a file with address data that can be imported in a French *MS Outlook*.
MS Outlook Italian	For generating a file with address data that can be imported in an Italian *MS Outlook*.
MS Outlook Portuguese	For generating a file with address data that can be imported in a Portuguese *MS Outlook*.
MS Outlook Spanish	For generating a file with address data that can be imported in a Spanish *MS Outlook*.

In doing so please note the following:

- It is important to know for which application the address data are exported so that they can be successfully reimported. If you are not sure about the format to use or the desired format is not offered in the combo box, please consult your system administrator.
- If you want to export the address data as backup copy for reimporting them at a later date to restore your address list, either select the ***ComAssistant 1.0/S*** or ***ComAssistant 2.0*** format.
- If the export is performed for a reimport in Lotus Notes, the export file must not have a file extension. Otherwise, the *Lotus Notes* import feature will not accept this file.

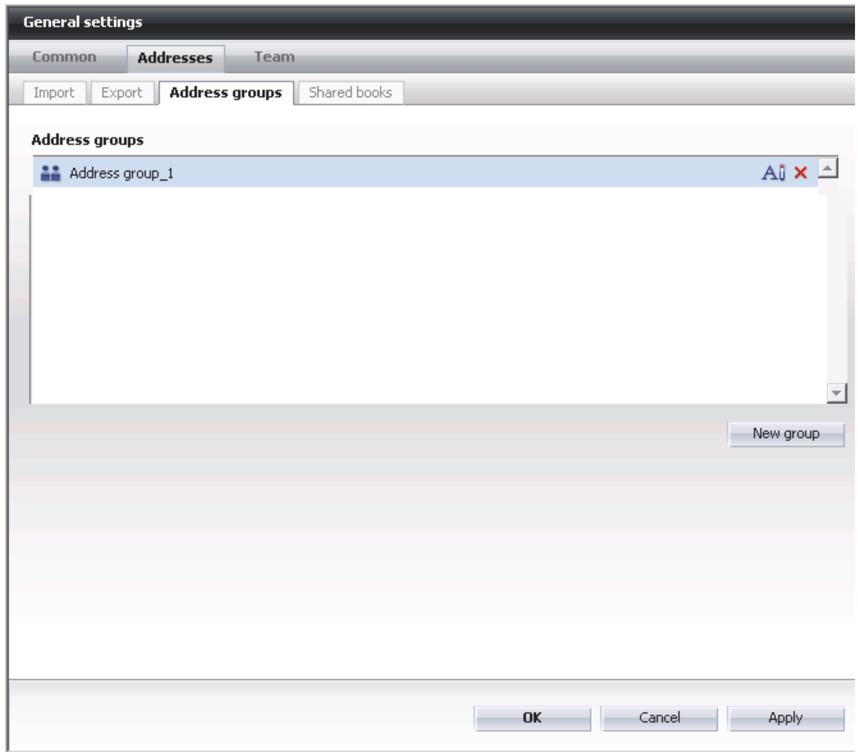
2. Select the address book from which you wish to export the address data in the **Export from** combo box. You can select:
   - The speed-dial list
   - One of the available shared address books.
3. Then click the **Export** button. The export process starts with the **File download** browser dialog opening for saving a file.
4. In the browser dialog click the **Save** button. The file selection dialog opens.
5. Select the directory in which the export file is to be saved and assign a name to the file.
6. In the file selection dialog click on **Save** to complete the export process. You can then access the export file there in the selected format.

The address data export is now complete.

3.6.2.4 Address Groups

Via the **Address groups** tab you can create groups for grouping contacts.

You reach this setting dialog via **menu > General > Addresses > Address groups** tab.



How to create and administer address groups is described in detail in Section 3.5.9.4, “Working with Address Groups”, on page 86.

3.6.2.5 Shared Address Books (optional)

Every *OpenScape Web Client* user can create shared address books that can be used by a group of selected coworkers. It is then for the group to decide who may use them and which privileges apply.

Shared address books can be used independently from already existing telephony teams (for example the *Team View*).

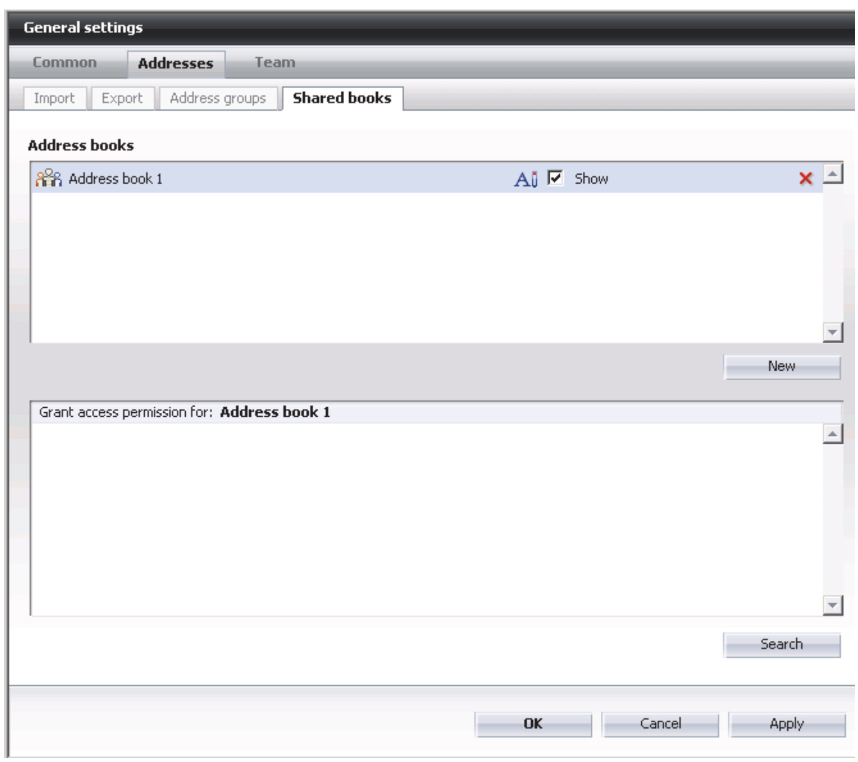
Creating a shared address book

You can create an address book for sharing it with a group of selected coworkers. The coworkers can grant the access privileges by themselves. One of the following access privilege can be set for each single coworker:

- Read access
  Users who have the read privilege may only read the contact entries.
- Administrator access
  Users who enjoy this full access can create, modify, read, delete contact entries and even delete the entire address book.

How to create shared address books:

1. Open the **Shared Address Books** setting dialog. You reach this dialog via **menu > General > Addresses > Shared Address Books** tab.



In the **Address books** display you find all shared address books that you can already access. If an address book has been selected in this display, the “Access permission for:” section thereunder shows the persons that may access this address books.

2. To create a new address book click the **New** button. A new address book is created.

3. Assign an expressive name to the address book, like *Department* or *Project Group.* Click on the AI icon **Rename the address book** to change the name. The address book name is represented as input field.

4. Enter a new name in this input field and push the return key. The address book now carries the desired name.

   When the **Show** option is active, you can see and use this address book in the **Shared Address Books** and **All Address Books** function window. Furthermore, it is used for identifying callers.

   A click on the ✕ **Delete the address book** icon removes the address book after you have confirmed a security prompt.

5. Click on the **Search** button, which is situated beneath the **Grant access permission for:** section, to define the coworkers and their privileges for the address book. The **Directory Search** dialog is displayed.

   The further proceeding is described in Section 3.5.15, “Directory Search (extended)”, on page 94.

3.6.3 Team (optional)

You can use the *Team View* in the *OpenScape Web Client* for cooperating even more efficiently within your team.

The *Team View* shows the members of your team. It also provides the following team features depending on the assigned privileges:

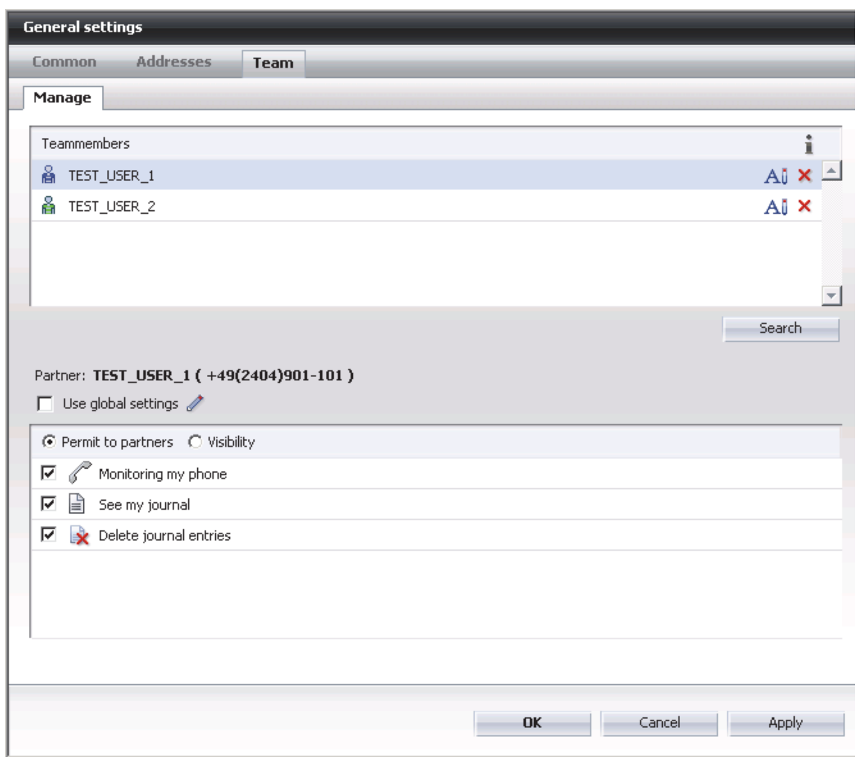
- Monitoring the team partner's phones.
- Calling team partners.
- Picking up calls for team partners.
- Accessing the journal entries (all calls) of a team partner).

You can configure the team functionality by yourself. I.e. you can freely determine what the team members are allowed or not allowed to do as regards their function within the team.

Selecting partners for the team

How to select partners for the team:

1. Open the **Manage** settings dialog. You reach this setting dialog via **menu > General > Team > Manage** tab.



2. Click on the **Search** button that you find beneath the **Teammembers** section to add new or further users as team partners. The **Directory Search** dialog is displayed.

The further proceeding is described in Section 3.5.15, “Directory Search (extended)”, on page 94.

Assigning privileges to the team partners

In the bottom section of the **Manage** dialog you can configure the privileges for the team partners. You can set these privileges globally (for all team partners) or individually (for single team partners). In case of new team partners, the global settings apply at first. You can also assign individual settings to each single team member.

When you select a team partner in the top list of the **Manage** dialog, the following settings become visible:

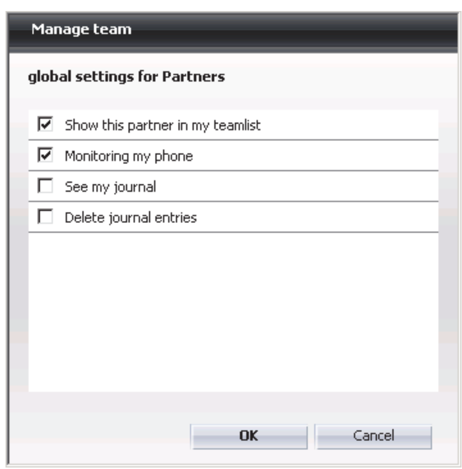
For a team partner applies...	Recognizable by...
...global privilege settings	• The green icon **Global Settings** appears before the team partner entry. • The **Use global settings** option is active.
...individual privilege settings	• The blue icon **Individual Settings** appears before the team partner entry. • The **Use global settings** option is inactive.

Changing global settings

NOTE: Changing and then saving your global settings affects all team partners for whom your global settings apply.

How to change your global settings:

1. Click on the **Edit global settings** icon found to the right of the **Use global settings** checkbox. The **Manage team > global settings for Partners** dialog opens:



These global settings effect the following:

Checkbox	Effect when active
Show this partner in my teamlist	The team partner is displayed in your *Team View*.
Monitoring my phone	The team partner is given permission to monitor your phone (activity display, call pickup, etc.).
See my journal	The team partner is given permission to view your call journal and to use it like his/her own.
Delete journal entries	The team partner is given permission to delete entries in your call journal. In other words, he/she is in full control of your call journal.

2. Change the settings by activating/deactivating the checkboxes according to your requirements.

3. Click on **OK** to save your modifications.

Changing individual settings

How to perform settings for one or several team partner(s) that deviate from the global settings:

1. Select the corresponding team partner from the list of team partners in the top section of the **Manage** dialog. The bottom section of the window shows the settings of this team partner.

2. Select the **Permit to partners** or **Visibility** radio buttons and activate/deactivate the checkboxes of the respectively appearing settings. The following settings become visible:

Radio button	Function
Permit to partners	Displayed settings: • Monitoring my phone • See my journal • Delete journal entries
Visibility	Displayed settings: • Show this partner in my teamlist

The settings have the following effect:

Checkbox	Effect when active
Show this partner in my teamlist	The team partner is displayed in your *Team View*.
Monitoring my phone	The team partner is given permission to monitor your phone (activity display, call pickup, etc.).
See my journal	The team partner is given permission to view your call journal and to use it like his/her own.
Delete journal entries	The team partner is given permission to delete entries in your call journal. In other words, he/she is in full control of your call journal.

As soon as you change a setting the **Use global settings** checkbox becomes inactive. You can also deactivate it by yourself. The team partner entry is preceded by the green icon **Global Settings** instead of the blue icon **Individual Settings**.

3. Click on the Apply button in the Manage dialog to save your modifications. A message appears that informs about your data having been backed up.

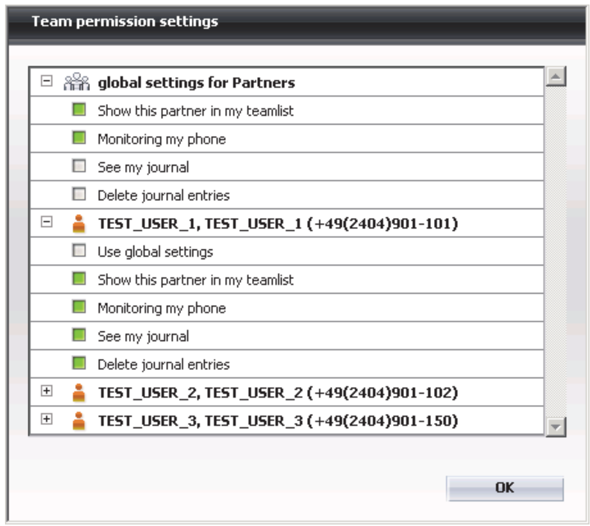
From this time the team is composed and active. The team partners appear in the *Team View* and those who have allowed you to monitor their telephone have been activated.

Displaying team information

If you wish to see the privileges you have assigned to the single team partners at a glance, you can invoke the **Team permission settings** window.

Execute the following steps:

1. Click on the info icon in the **Manage** dialog. You find it in the top dialog section on the right hand side in the team partners' header bar. The **Team permission settings** window is displayed.



2. You cannot perform any settings in this window, it merely serves as overview. With a click on the icons Expand and Hide you can display the full information about the global settings and single team partners.

3. Click on **OK** to close the window.

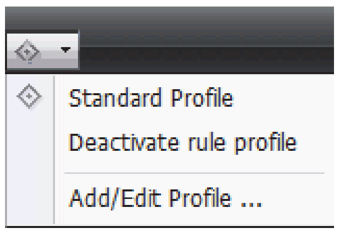
3.7 Rule Profile – Handling Calls with Rules

Useful help

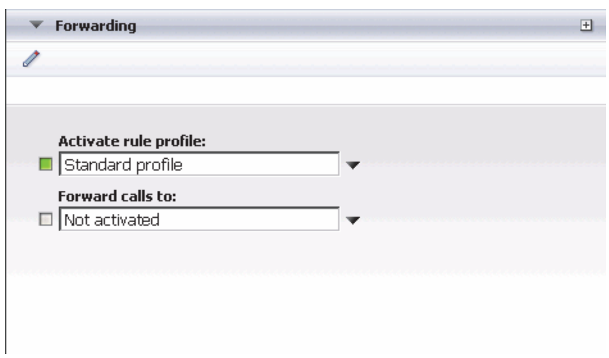
Imagine your are often on the road and cannot process your incoming calls yourself. It is then useful to automatically rate the calls and forward them to competent contacts. In this case the rule interpreter is a useful help.

For example, you can specify that calls arriving during a meeting that takes place regularly once a week at a specific day and time are automatically routed to your secretary.

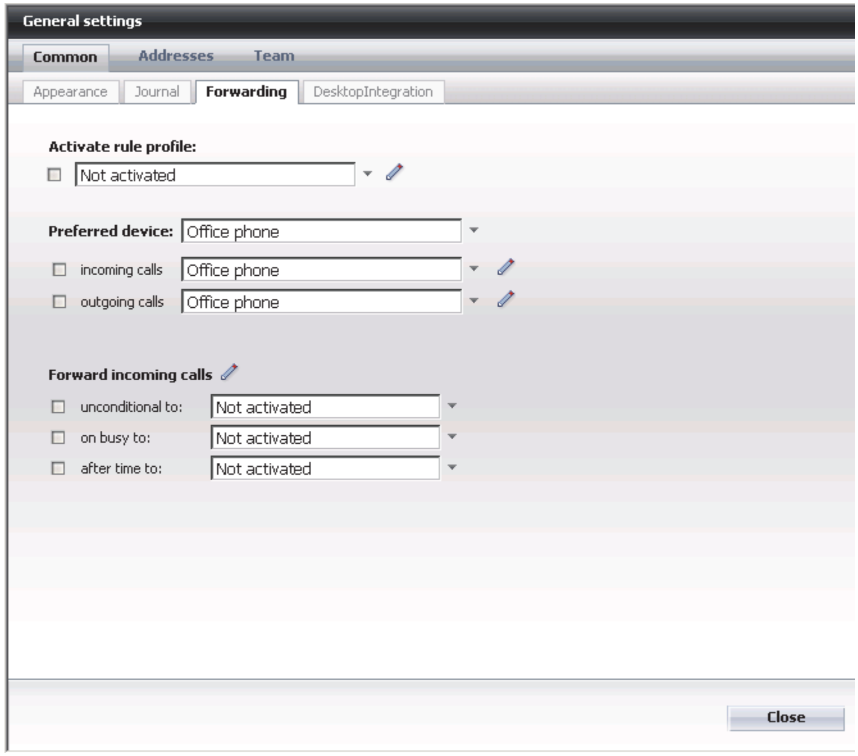
You can activate the rule profile via the rule menu (quick access) of the main menu by selecting the desired profile there.



As alternative you can activate the rule profile via the **Forwarding** dialog or ...



... via **menu > General > Common > Forwarding**.



Convenient and comprehensive setting options are provided.

NOTE: The forwarding settings take precedence over the rule interpreter settings. Conflicts between these settings may also occur. To make sure that the rules are processed, it is useful to deactivate the call forwarding settings.

Content

This section contains the following topics:

- **Useful Knowledge of the Rule Interpreter**
- **Creating Example Scenarios**
- **Detailed Work Steps**
- **Getting to know the User Interface of the Rule Interpreter**

3.7.1 Useful Knowledge of the Rule Interpreter

Overview

This section names and describes the most important terms important for using the rule interpreter.

Content

This section contains the following topics:

- **Relation between Rules and Profiles**
- **Lists of persons**
- **Date Lists**
- **The most important Rule and Profile Creation Steps**

3.7.1.1 Relation between Rules and Profiles

Rules and profiles

As these terms will be used in the following sections, we explain them at this point:

- **Rule**
  With a rule you define how incoming calls shall be handled.
  Example: routing the calls from preferred customers to the individual cell phone in case of absence.
- **Profile**
  The profile serves as rule container. It may contain one or several rules that can be prioritized against each other.
  Example: Profile "Meetings" contains the rules "Jour Fix" and "ProjectMeeting".

Please note that only profiles but not single rules can be activated. Consequently, a rule can only be executed if it was assigned to a profile.

Rules and their priorities

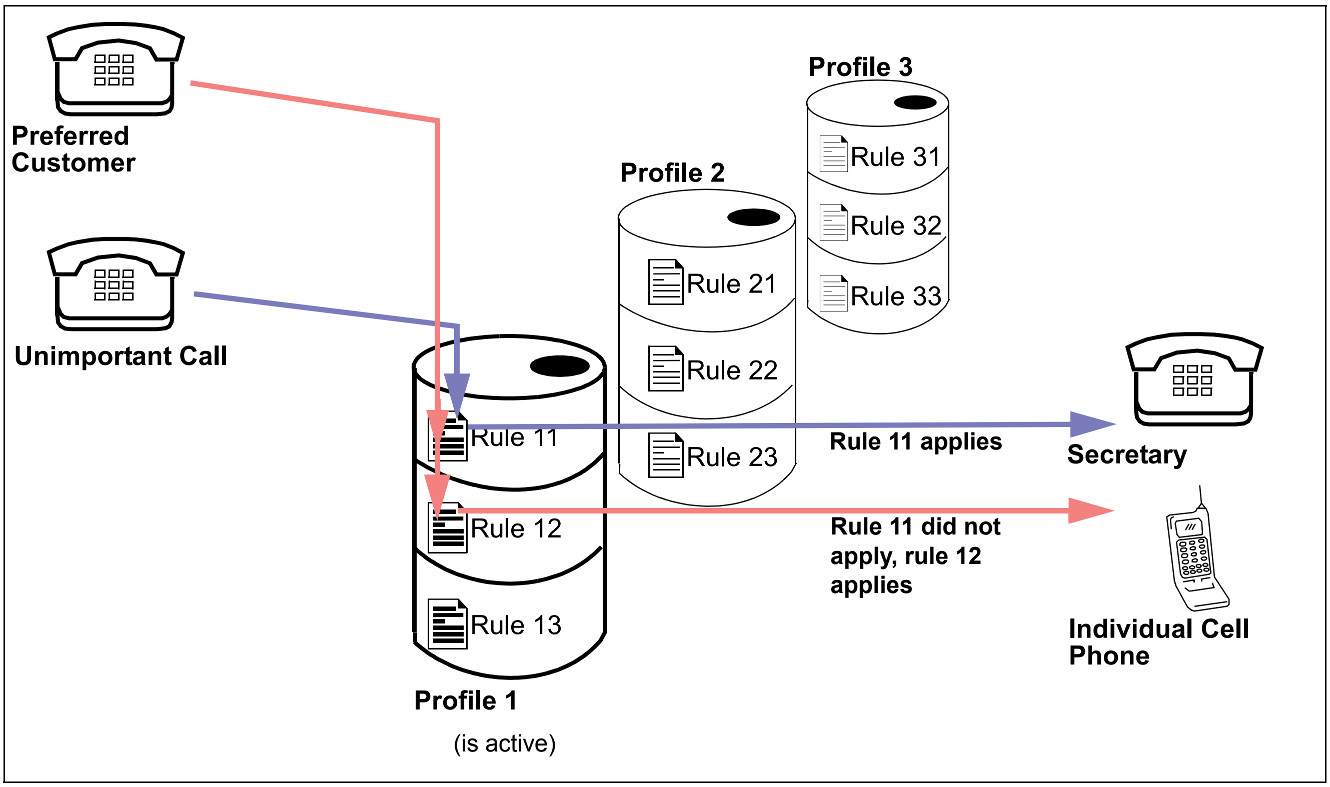
Rules are generally grouped in three priority groups: "High", "Normal" and "Low". They are itemized in a list in the associated profile.

Generally applies: The higher the position in the list, the higher the priority. All rules are grouped in a priority group. "High" means at the top, "Normal" in the middle and "Low" at the bottom of the list.

Within a group (e. g. three rules of the “Normal” group) the priority can be affected by arrow icons: △ (**Move the selected rule up**) or ▽ (**Move the selected rule down**).

When a profile is active, the rules of the profile are checked from the top to the bottom until a rule applies. This rule will then be executed. All following rules are ignored.

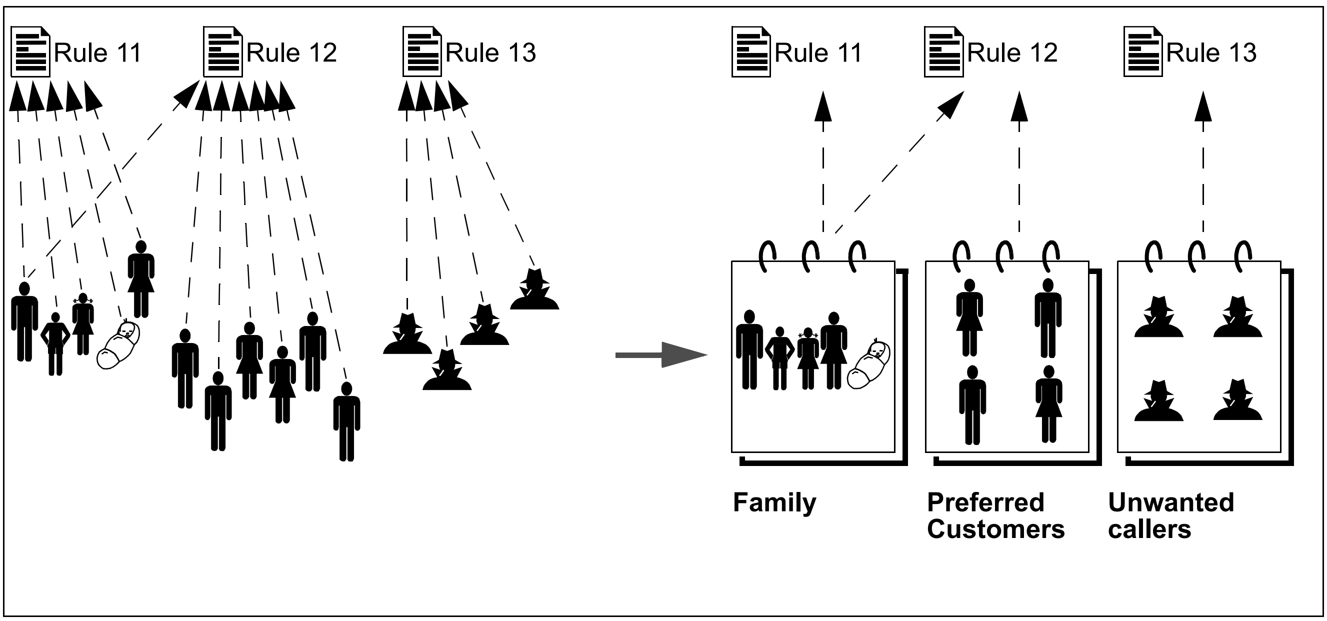
Graphic example of call handling



3.7.1.2 Lists of persons

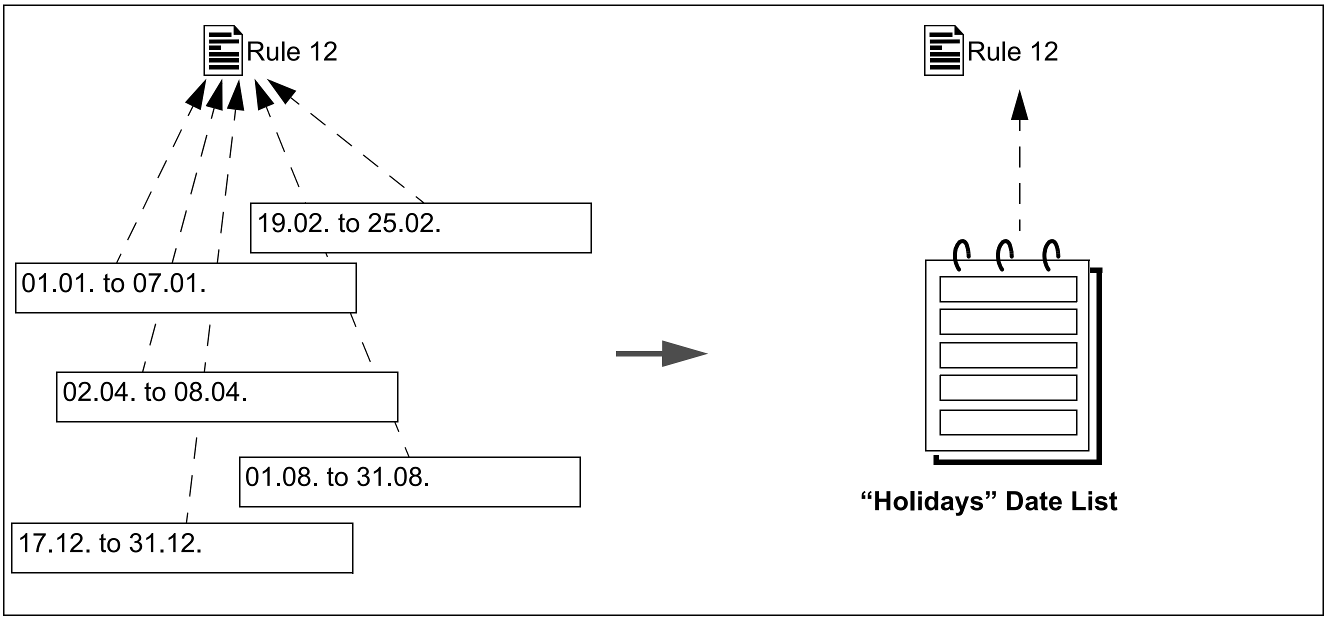
There are many persons you might call. Assigning each single person to one or several rules can be tedious. Therefore it is useful to group these persons, e. g. “Family”: “Preferred Customers”: “Unwanted Callers”. The rule interpreter offers lists of persons for this purpose. It is thus possible to integrate all members of your family in the “Family” list of persons. Several lists are possible.

Another advantage is that you can add further persons to each list and these persons are then automatically linked to the rule. The rule itself need not be modified.



3.7.1.3 Date Lists

You can use a date list to determine that a rule is only to apply on specific days. For example, a rule may only apply during your short breaks and your annual holiday. In this case you can define single days and also periods in this rule. So that you need not alter the rule when your holidays are rescheduled, you can also specify a date list and link it to the rule. You only need to modify the list then, but the rule itself remains unchanged.



3.7.1.4 The most important Rule and Profile Creation Steps

The following steps are required for creating rules and profiles:

1. Creating a profile to contain the rule (if no profile exists yet).
2. Creating a list of persons of a date list (optional).
3. Creating the rule and assigning the rule to an available profile.
4. If a profile in a priority group contains several rules: specifying the priority within the group.
5. Activating the profile.

These steps are described in detail in the following sections based on example scenarios.

3.7.2 Creating Example Scenarios

Examples

The rule interpreter supports you in the most different situations. Here are some example scenarios:

- **“Normal” Scenario** All callers are to be routed to you. If, however, persons call that are itemized in your unwanted-callers list, these calls are to be routed to your secretary.
- **“Meeting” Scenario** When you take part in a company meeting, all calls are automatically to be routed to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to you.
- **“Business Trip” Scenario** If you are on a business trip, all calls are to be routed to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to your cell phone. Your preferred customers may only call you from Monday to Friday 8:00 a.m. to 4:00 p.m.. You family may reach you any time.

Realization

You enable the mentioned example scenarios in the rule interpreter by specifying profiles, rules and lists of persons. This is described in the following sections. You can customize these scenarios or design new ones and thus create your own “body of rules”.

Content

This section contains the following topics:

3.7.2.1 “Normal” Scenario

Description of the scenario

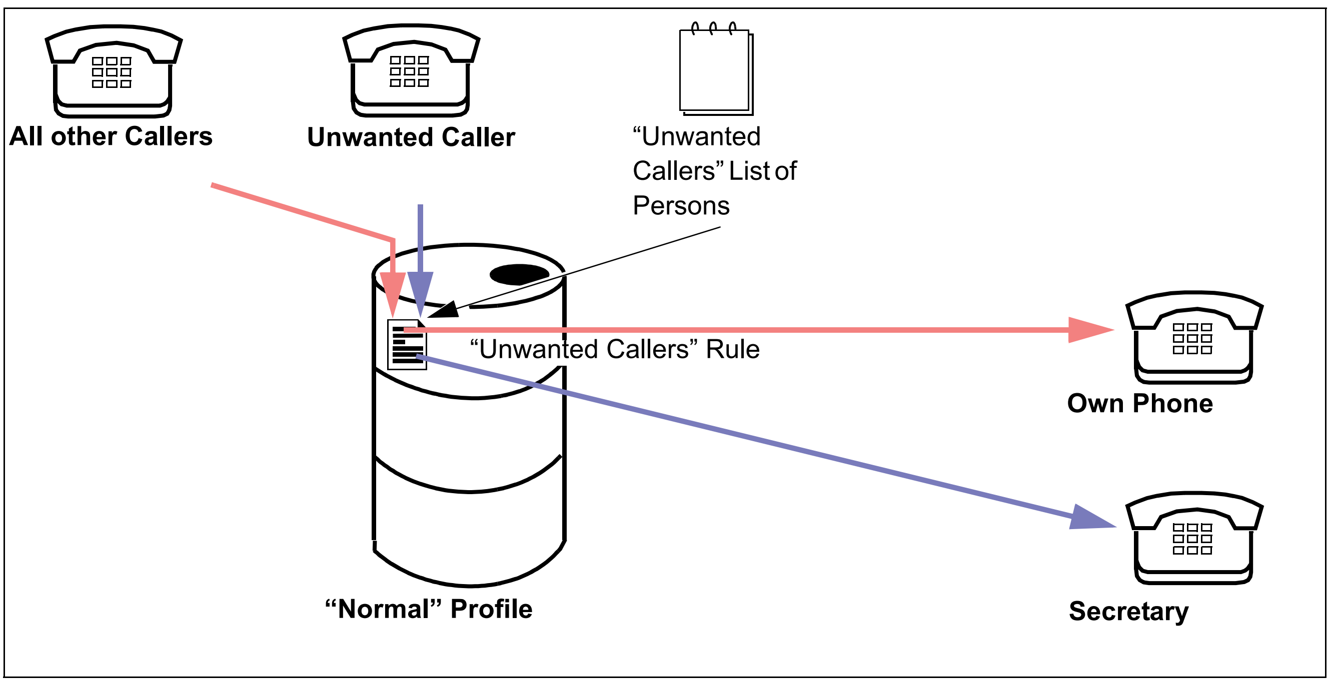
All callers are to be routed to you. If, however, persons call that are itemized in your unwanted-callers list, these calls are to be routed to your secretary.

Re-enacting the scenario

To check whether the profiles, rules and lists of persons you have created for this scenario really work, it is useful to re-enact this scenario. To this you need:

- Your own telephone
- A telephone for your “secretary“
- A telephone for ”unwanted callers“
- A telephone for ”all other callers“

Graphical overview of the “Normal” scenario



To be created

For this scenario you need to create:

- The ”Normal“ profile
- An “unwanted callers” list of persons
- An “unwanted callers” rule

Each rule must be assigned to a profile to take effect. It is therefore useful to first create the “Normal” profile as container for the “unwanted callers” rule.

The “unwanted callers” list of persons provides a convenient option to link all unwanted callers to the rule. You could, however, also link each single unwanted caller to the rule.

Function

The rule checks whether the caller is an “unwanted caller”. If yes, the call is routed to the secretary, if no, the call is put through.

Proceedings

To represent the information for creating the rule as clearly as possible, the proceedings are divided into single steps. In addition, each step also refers to section in which the proceedings are described in more detail.

How to create the “Normal” scenario:

1. Open the **Rules** dialog.
   The detailed proceeding is described in Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.
2. Create a new profile called ”Normal”.
   The detailed proceeding is described in Section 3.7.3.2, “Creating a new Profile”, on page 153.
3. Create the following list of persons
   - “Unwanted Callers“

   The detailed proceeding is described in Section 3.7.3.3, “Creating a new List of Persons”, on page 155.

4. Create a new rule and assign it the name “Unwanted Callers”. Then set the following:

   – “If call from”: Add the “Unwanted Callers” list of persons.

   – “If date / time”: Leave empty.

   – “Action”: Specify the “Secretary” as routing destination.

   – “Assigned profiles”: Assign the “Normal” profile.

   The detailed proceeding is described in Section 3.7.3.4, “Crating Rules”, on page 157.

5. If a profile contains several rules within a priority group: Specify the rule priorities (not necessary in this scenario).

   The detailed proceeding is described in Section 3.7.3.5, “Specifying Rule Priorities”, on page 160.

6. Activate the “Normal” profile.

   The detailed proceeding is described in Section 3.7.3.6, “Activating a Rule Profile”, on page 161.

3.7.2.2 “Meeting” Scenario

Description of the scenario

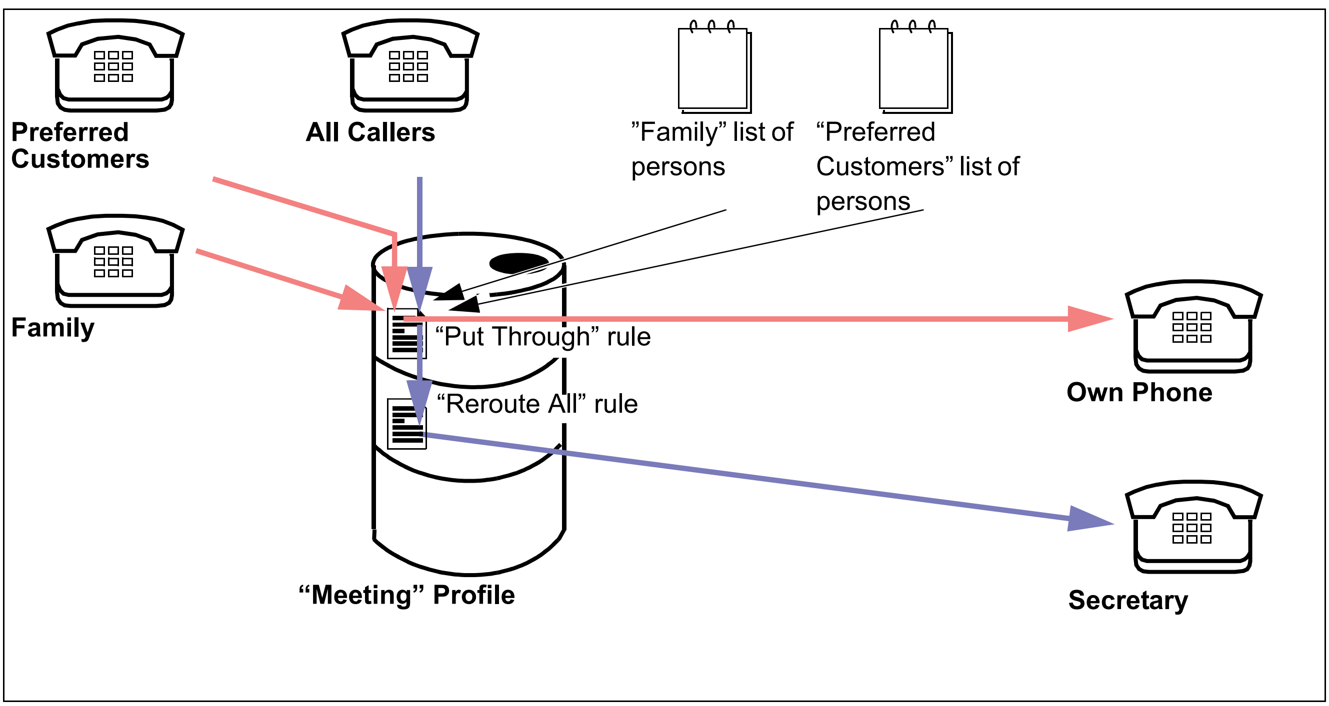
When you take part in a company meeting, all calls are automatically to be routed to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to you.

Re-enacting the scenario

To check whether the profiles, rules and lists of persons you have created for this scenario really work, it is useful to re-enact this scenario. To this you need:

- Your own telephone
- A telephone for your “secretary“
- A telephone for “preferred customers“
- A telephone for “family“
- A telephone for ”all callers“

Graphical overview of the “Meeting” scenario



To be created

For this scenario you need to create:

- The “Meeting“ profile
- A “Family“ list of persons
- A “Preferred Customers“ list of persons
- A “Put Through“ rule
- A “Reroute All“ rule

Function and arrangement of the rules

When a call comes in, first the rule with the highest priority is checked for applicability. If it applies, the rules that follow are no longer considered. The “Put Through” rule must therefore be on top of the ”Reroute All” rule to give it a higher priority. This is specified in the “ Rules of profile” list of the “Profile” window.

If, contrary to this, the “Reroute All” rule had a higher priority, all calls would be immediately routed to the secretary, and the “Put Through” rule would never be applied.

Proceedings

To represent the information for creating the rule as clearly as possible, the proceedings are divided into single steps. In addition, each step also refers to section in which the proceedings are described in more detail.

How to create the “Meeting” scenario:

1. Open the **Rules** dialog.
   The detailed proceeding is described in Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.
2. Create a new profile called ”Meeting”.
   The detailed proceeding is described in Section 3.7.3.2, “Creating a new Profile”, on page 153.
3. Create the following list of persons
   - “Family”
   - “Preferred Customers”

   The detailed proceeding is described in Section 3.7.3.3, “Creating a new List of Persons”, on page 155.

4. Create a new rule and assign it the name “Put Through”. Then set the following:
   - From the priority group: “High”, “Normal”, “Low”: select “High”.
   - “If call from”: Add the “Family” and “Preferred Customers” lists of persons.
   - “If date / time”: Leave empty.
   - “Action”: Specify the individual telephone as routing destination.
   - “Assigned profiles”: Assign the “Meeting” profile.

   The detailed proceeding is described in Section 3.7.3.4, “Crating Rules”, on page 157.

5. Create a new rule and assign it the name “Reroute All”. Then set the following:
   - From the priority group: “High”, “Normal”, “Low”: select “Normal”.
   - “If call from”: Do not change the “All” default.
   - “If date / time”: Leave empty.
   - “Action”: Specify the “Secretary” as routing destination.
   - “Assigned profiles”: Assign the “Meeting” profile.

   The detailed proceeding is described in Section 3.7.3.4, “Crating Rules”, on page 157.

6. If a profile contains several rules within a priority group: Specify the rule priorities (not necessary in this scenario).

   The detailed proceeding is described in Section 3.7.3.5, “Specifying Rule Priorities”, on page 160.

7. Activate the “Meeting” profile.

   The detailed proceeding is described in Section 3.7.3.6, “Activating a Rule Profile”, on page 161.

3.7.2.3 “Business Trip” Scenario

Description of the scenario

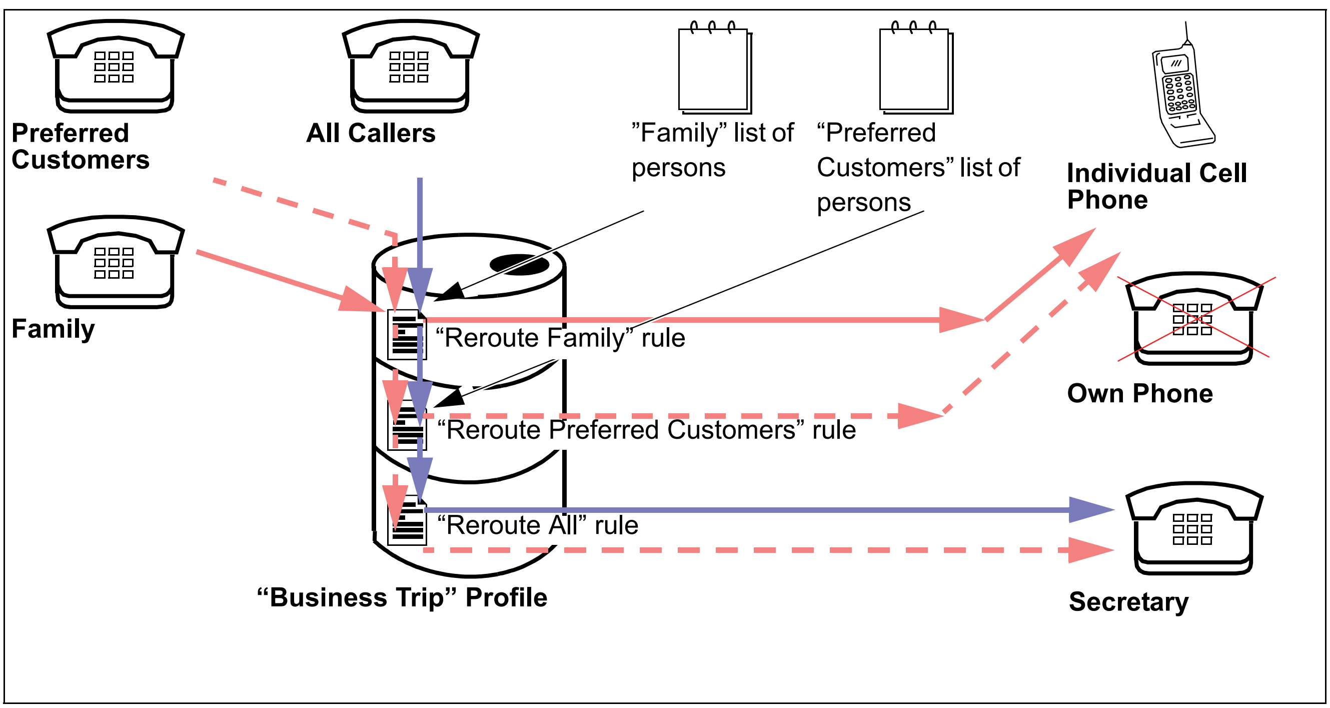
If you are on a business trip, all calls are to be routed to the secretary. If, however, preferred customers or a member of your family call, the call is to be routed to your cell phone. Your preferred customers may only call you from Monday to Friday 8:00 a.m. to 4:00 p.m.. You family may reach you any time.

Re-enacting the scenario

To check whether the profiles, rules and lists of persons you have created for this scenario really work, it is useful to re-enact this scenario. To this you need:

- Your cell phone
- A telephone for your “secretary“
- A telephone for “preferred customers“
- A telephone for “family“
- A telephone for ”all callers“

Graphical overview of the “Business Trip” scenario



To be created

For this scenario you need to create:

- The “Business Trip“ profile
- A “Family“ list of persons
- A “Preferred Customers“ list of persons
- A “Reroute Family“ rule
- A “Reroute Preferred Customers“ rule
- A “Reroute All“ rule

Function and arrangement of the rules

Since you want your family always be able to reach you but the preferred customers only during business hours, two rules are now required: the “Reroute Family” and the “Reroute Preferred Customers” rule.

First, the “Reroute Family” rule checks whether the call comes from a member of the family, and if so, the call is routed to your cell phone. If not, the “Reroute Preferred Customers” rule will check whether the call comes from a preferred customer and whether he/she calls between 8:00 a.m. and 4:00 p.m. If both conditions are met, the caller is routed to your cell phone. If the conditions are not fulfilled, the call is routed to the secretary by the “Reroute All” rule.

The sequence matters here as well: 1. “Reroute Family”, 2. “Reroute Preferred Customers” and 3. “Reroute All” – highest priority -> medium priority -> low priority. If, for example, the “Reroute All” rule came in second position, you could be reached by your family but the preferred customers would always talk to the secretary as the “Reroute Preferred Customers” rule would never be applied.

Proceedings

To represent the information for creating the rule as clearly as possible, the proceedings are divided into single steps. In addition, each step also refers to section in which the proceedings are described in more detail.

How to create the “Business Trip” scenario:

1. Open the **Rules** dialog.
   The detailed proceeding is described in Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.
2. Create a new profile called ”Business Trip”.
   The detailed proceeding is described in Section 3.7.3.2, “Creating a new Profile”, on page 153.
3. Create the following list of persons (if not done yet):
   – “Family”

   - “Preferred Customers”

   The detailed proceeding is described in Section 3.7.3.3, “Creating a new List of Persons”, on page 155.

4. Create a new rule and assign it the name “Reroute Family”. Then set the following:

   - From the priority group: “High”, “Normal”, “Low”: select “High”.
   - “If call from”: Add the “Family” list of persons.
   - “If date / time”: Leave empty.
   - “Action”: Specify the cell phone as routing destination.
   - “Assigned profiles”: Assign the “Business Trip” profile.

   The detailed proceeding is described in Section 3.7.3.4, “Crating Rules”, on page 157.

5. Create another new rule and assign it the name “Reroute Preferred Customers”. Then set the following:

   - From the priority group: “High”, “Normal”, “Low”: select “Normal”.
   - “If call from”: Add the “Preferred Customers” list of persons.
   - “If date / time”: In the “Date/Time” window:
   - Activate the Mo, Tu, We, Th, Fr checkboxes.
   - For “Time” enter the range 08:00 - 16:00.
   - “Action”: Specify the cell phone as routing destination.
   - “Assigned profiles”: Assign the “Business Trip” profile.

   The detailed proceeding is described in Section 3.7.3.4, “Crating Rules”, on page 157.

6. Create a new rule and assign it the name “Reroute All”. Then set the following:
   - From the priority group: “High”, “Normal”, “Low”: select “Low”.
   - “If call from”: Do not change the “All” default.
   - “If date / time”: Leave empty.
   - “Action”: Specify the “Secretary” as routing destination.
   - “Assigned profiles”: Assign the “Business Trip” profile.

   The detailed proceeding is described in Section 3.7.3.4, “Crating Rules”, on page 157.

7. If a profile contains several rules within a priority group: Specify the rule priorities (not necessary in this scenario).

   The detailed proceeding is described in Section 3.7.3.5, “Specifying Rule Priorities”, on page 160.

8. Activate the “Business Trip” profile.

   The detailed proceeding is described in Section 3.7.3.6, “Activating a Rule Profile”, on page 161.

3.7.3 Detailed Work Steps

Overview

In this section the scenarios introduced in the previous sections will be realized by concrete steps. The settings you see in the figures are examples and need to be replaced with the scenario settings or your own ones.

Proceedings

This section contains the following topics:

- **Invoking the Settings Dialog Boxes for the Rule Interpreter**
- **Creating a new Profile**
- **Creating a new List of Persons**
- **Crating Rules**
- **Specifying Rule Priorities**
- **Activating a Rule Profile**

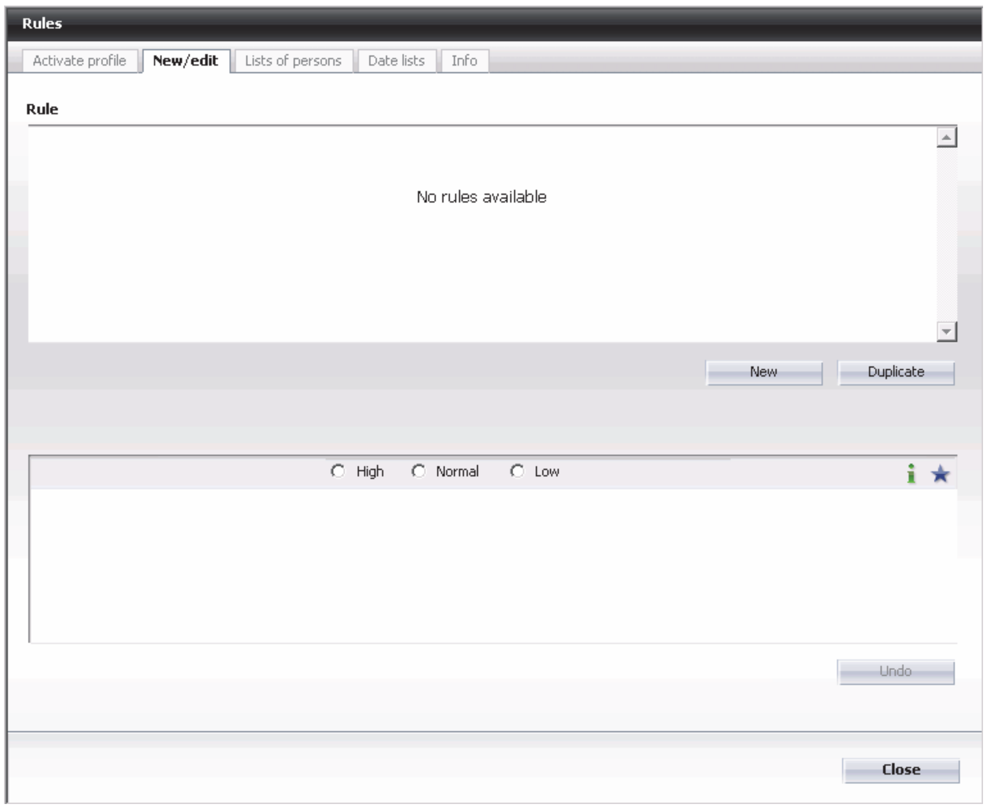
3.7.3.1 Invoking the Settings Dialog Boxes for the Rule Interpreter

You reach all dialogs for specifying profiles, rules, person and date lists by invoking the main menu option **menu** and the **Rules** feature.

Proceedings

How to invoke the dialog:

1. In the main menu select **menu > Rules**. The **Rules** dialog opens.



The menu bar of this dialog contains the following tabs:

- **New/edit**
  See Section 3.7.4.1, ““New/edit” Tab”, on page 163.
- **Activate profile**
  See Section 3.7.4.6, ““Activate profile” Tab”, on page 175.
- **Lists of persons**
  See Section 3.7.4.7, ““Lists of persons” tab”, on page 177.

- **Date lists**
  See Section 3.7.4.8, ""Date lists" tab", on page 179.
- **Info**
  See Section 3.7.4.9, ""Info" Tab", on page 181.

Invoke the respective windows and perform the desired modifications.

3.7.3.2 Creating a new Profile

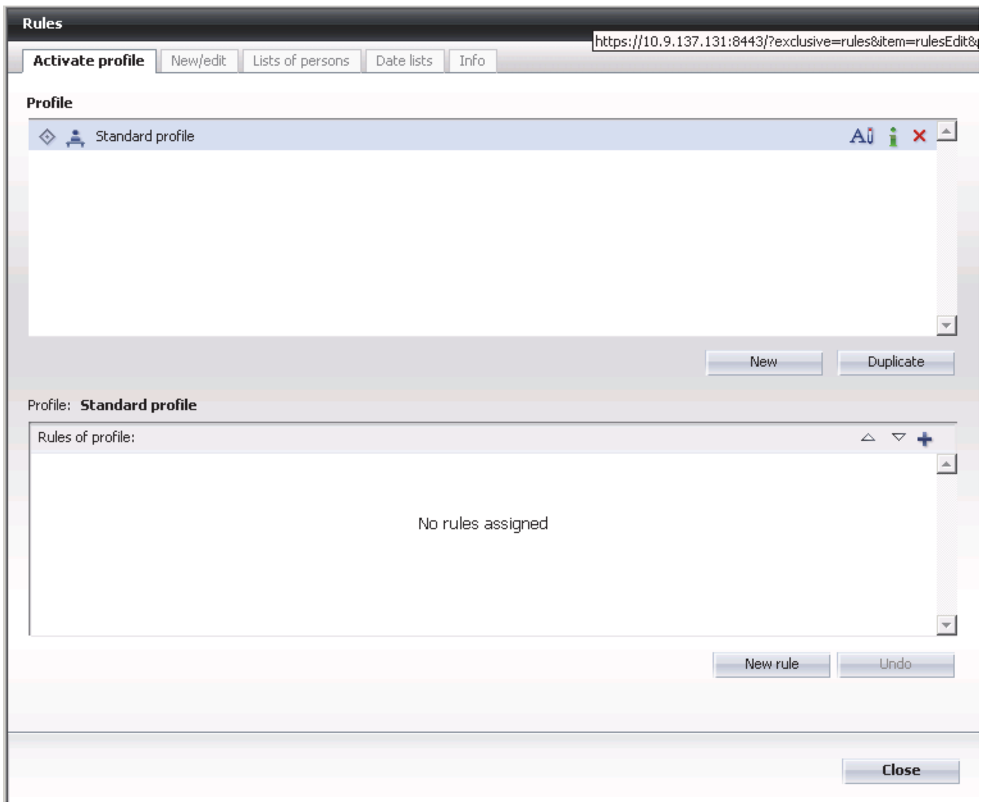
In this section we will create a new profile. It serves as container for the rules already created or to be created.

Proceedings

How to invoke the dialog:

1. In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/edit** tab. See Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.

2. Switch to the **Activate profile** tab.



NOTE: For comprehensive information about the “Profile” window see: Section 3.7.4.6, ““Activate profile” Tab”, on page 175.

---

3. To create a new rule click the **New** button. In the “Profile” display a new profile called “New profile” is created.

4. Click on the **Edit the profile name** icon in the line of the new profile. The profile name is represented as entry field.

NOTE: You can also directly click the name “New profile” to change it.

---

5. Insert the new name and push the enter key on your keyboard. The profile now carries the desired name.

The new profile is now created but no rule has been assigned to it yet.

3.7.3.3 Creating a new List of Persons

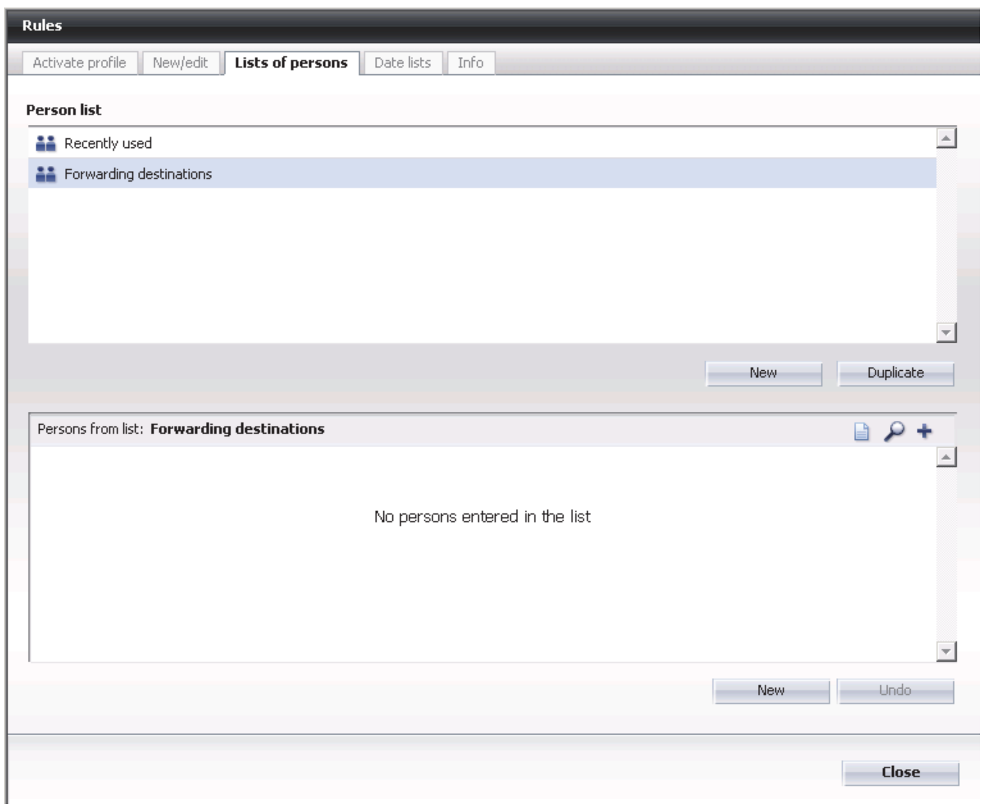
In this section we will create a new list of persons. Lists of persons serve for grouping callers and for conveniently linking these groups to a rule. If a caller is to be linked to a rule, he/she only needs to be added to a list of persons so that the rule itself can remain unchanged.

Proceedings

How to create a new list of persons:

1. In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/edit** tab. See Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.

2. Switch to the **Lists of persons** tab.



NOTE: For comprehensive information about the “Edit person list” window see: Section 3.7.4.7, ““Lists of persons” tab”, on page 177.

---

3. To create a new list of persons click the **New** button. The “Person list” display shows a new list of persons named “New list of persons”.

4. Renaming the list of persons:

1. Click on the **Rename list of persons** icon. The list of persons name is represented as entry field.

NOTE: You can also directly click the name “New list of persons” to change it.

2. Insert the new name and push the enter key on your keyboard. The list of persons now carries the desired name.
   The bottom display “Persons from list” shows the persons contained in this list of persons. It is still empty and needs to be filled in.

5. Filling the list of persons with entries: Click in the “Persons from list” display on:

– **Either:** the icon **Add person from list**. The available lists of persons are offered for selection. You can select the desired person entry (with phone number and e-mail address) from these lists.

– **Or:** the icon **Search for a person and add him/her to the list**. The “Directory Search” dialog opens. Perform the search and activate in the hitlist the checkboxes of the persons that you want to copy. Then click on the **Apply** button. The desired persons are copied to the list of persons. See also Section 3.5.15, “Directory Search (extended)”, on page 94.

– **Or:** the icon **Enter new person for the list**. An entry dialog opens and you can manually add a new person-entry to the list of persons with name, telephone number and e-mail address.

NOTE: The entry dialog also opens when you click the **New** button at the bottom.

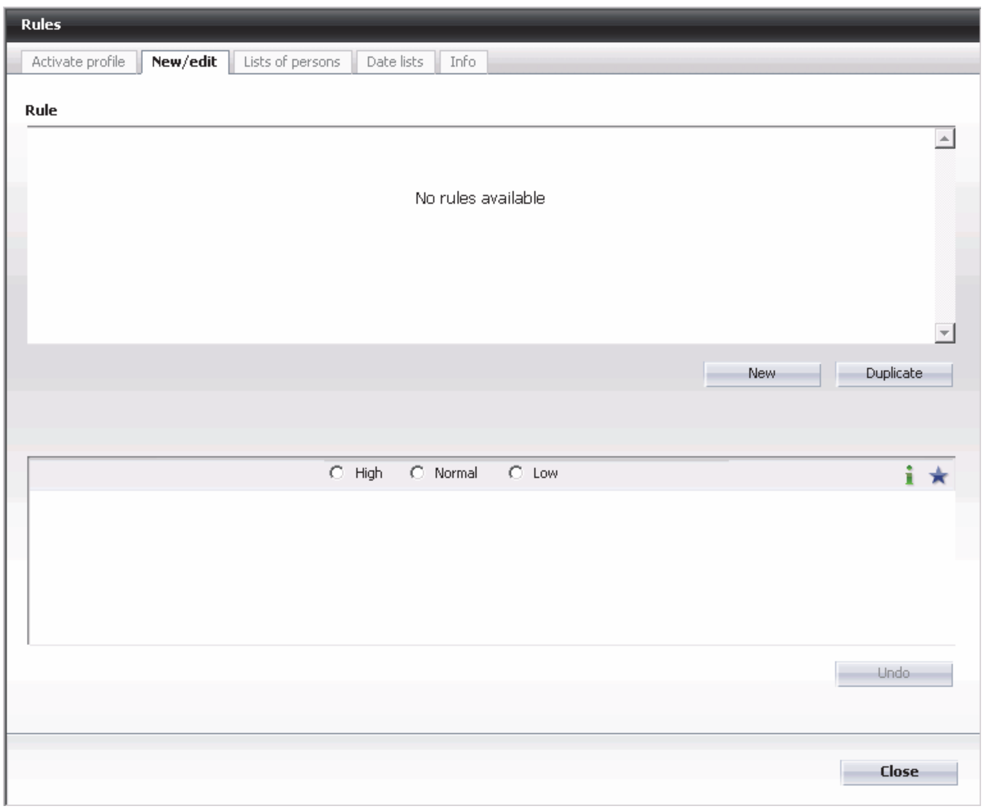
3.7.3.4 Crating Rules

This section describes the steps for creating a new call rule and for specifying your settings. The entries you see in the figures are examples. The settings can be performed as described in the example scenarios. But you can also customize the settings.

Creating a new rule

How to create a new rule:

1. In the main menu select **menu > Rules**. The **Rules** dialog opens directly with the **New/edit** tab. See Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.



NOTE: For comprehensive information about the “Edit rule” window see: Section 3.7.4.1, ““New/edit” Tab”, on page 163.

2. To create a new rule click the **New** button. The “Rule” display shows a new rule named “New rule”.

3. Renaming a rule:

    1. Click on the **Rename rule** icon. The rule name is represented as entry field.

    2. Insert the new name and push the enter key on your keyboard. The rule now carries the desired name.

Performing rule settings

The bottom display ”<*rule name*>” shows the default settings for the newly created rule.

How to configure the default values for your application case:

1. Activate “High”, “Normal” or “Low” to specify the priority group for the rule. After you have saved the rule, it is indicated in the “Rule” display as follows: red bell - “High”, yellow bell - “Normal”, green bell - “Low”).

2. Click on the **Edit entry** icon of the setting that you want to change according to the example scenarios or based on your own requirements. The respective setting dialogs are displayed:

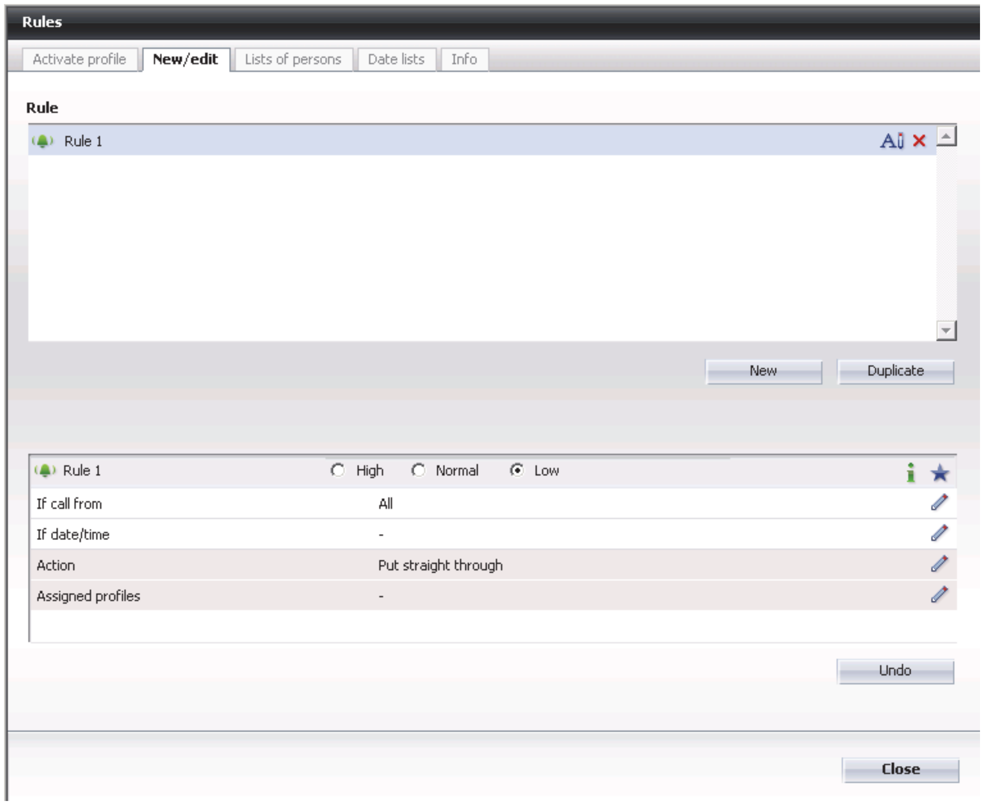
    – “Incoming call from”: see Section 3.7.4.2, ““If call from” Dialog”, on page 167.

    – “Date / Time”: see Section 3.7.4.3, ““Date/Time” Dialog”, on page 169.

    – “Action”: see Section 3.7.4.4, ““Action” Dialog”, on page 171.

    – “Assign profiles to rule”: see Section 3.7.4.5, ““Assign profiles to rule” Dialog”, on page 173.

3. Click the **Close** button. The new rule is saved. The “Edit rule” window may look like this:



3.7.3.5 Specifying Rule Priorities

Each rule can be assigned to a priority group. The priority groups are “High”, “Normal” and “Low”. The rules of the “High” priority group are processed first. Within a profile the rules are also prioritized against each other: The rules are processed from top to bottom.

The priority groups are specified on the **New/edit** tab and the priorities within a profile are defined on the **Activate profile** tab.

Proceedings

How to prioritize a rule an a profile:

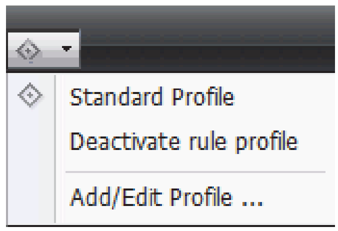
1. In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/edit** tab. See Section 3.7.3.1, “Invoking the Settings Dialog Boxes for the Rule Interpreter”, on page 151.
2. Switch to the **Activate profile** tab.
3. Select the profile for which you want to specify priorities. The “Rules of profile” display shows all rules linked to this profile (priority groups: red bell - “High”, yellow bell - “Normal”, green bell - “Low”):
4. Select a rule and either click on the **Move the selected rule up** or on the **Move the selected rule down** icon. By moving the rule up, its priority increases within the group and it will be processed earlier.
5. Click the **Close** button. The modifications are saved.

3.7.3.6 Activating a Rule Profile

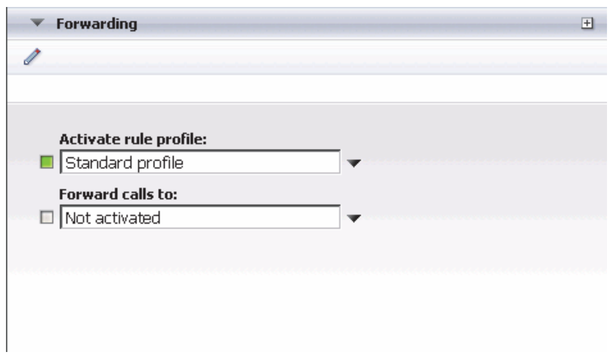
So that a profile and the rules linked to it can take effect, it must be activated.

Activate profile

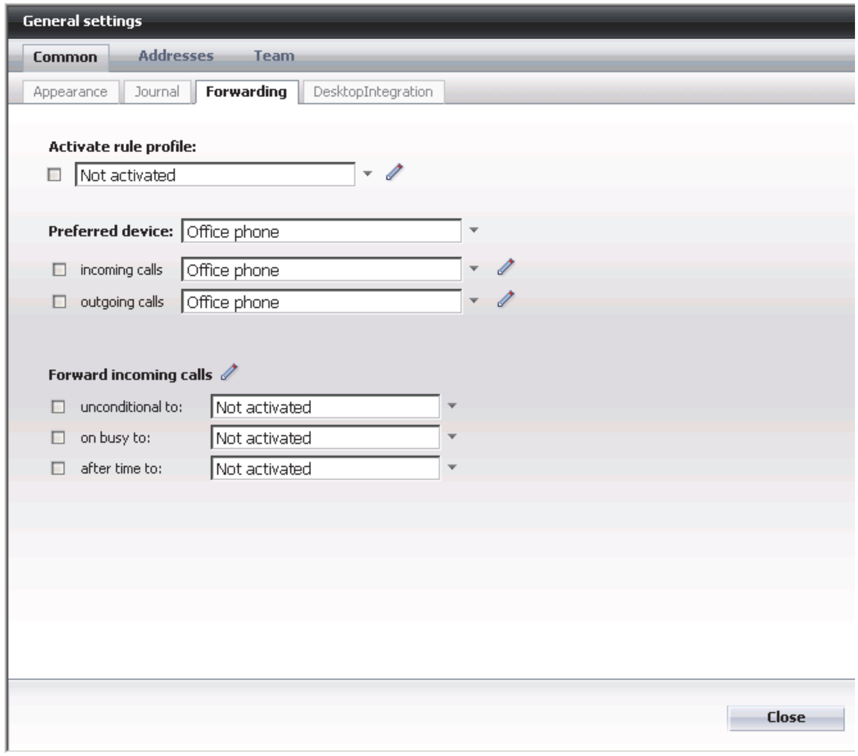
You can activate the rule profile via the rule menu (quick access) of the main menu by selecting the desired profile there.



As alternative you can activate the rule profile via the **Forwarding** dialog or ...



... via **menu > General > Common > Forwarding**.



NOTE: The call forwarding settings under “Forward incoming calls:” and “outgoing calls:” are processed preferably against the rule interpreter. Conflicts between all settings may also occur. If you want to ensure that the rules are processed it is useful to select the “Not activated” setting under “Forward incoming calls:” and “outgoing calls:”.

3.7.4 Getting to know the User Interface of the Rule Interpreter

Overview

The examples dealt with in the previous sections served for illustrating the rule interpreter handling. But we did not consider all possible settings. This section shows all windows of the rule interpreter and describes all setting options.

Content

This section contains the following topics:

- **"New/edit" Tab**
- **"Activate profile" Tab**
- **"Lists of persons" tab**
- **"Date lists" tab**
- **"Info" Tab**

3.7.4.1 "New/edit" Tab

Invoking the dialog

In the main menu select **menu > Rules**. The **Rules** dialog opens directly with the **New/edit** tab.

Further dialogs

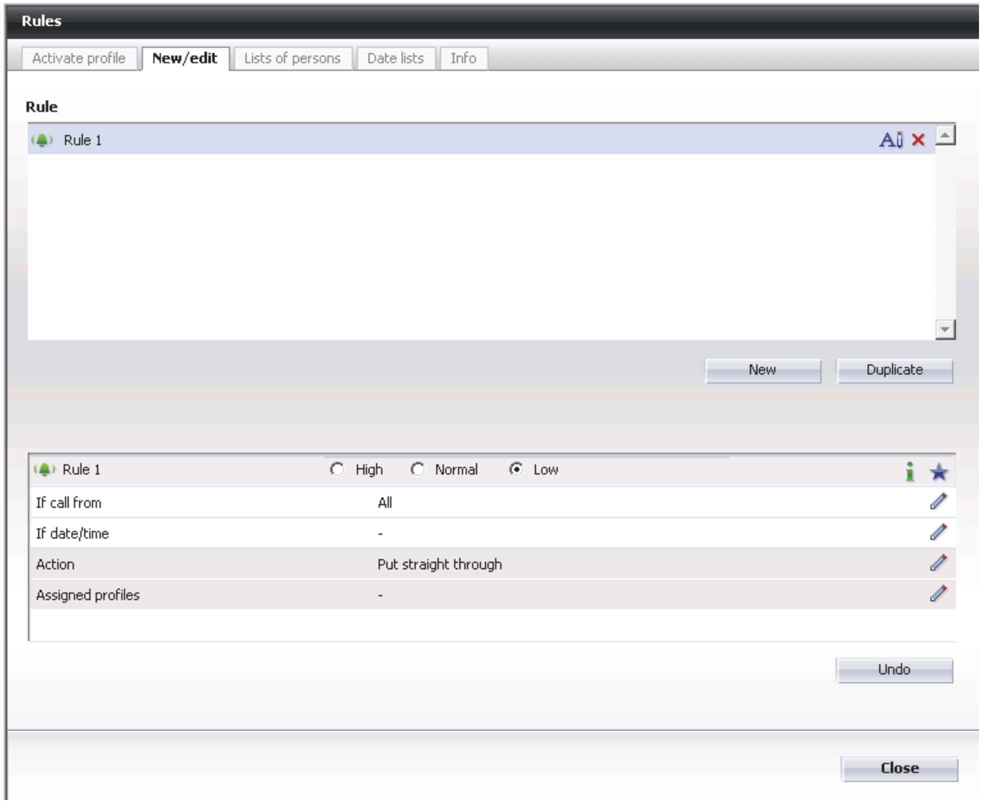
Via the **New/edit** tab you can invoke further windows:

- **"If call from" Dialog**
- **"Date/Time" Dialog**
- **"Action" Dialog**
- **"Assign profiles to rule" Dialog**

Overview

The top section of the "New/edit" tab lists all rules. In the bottom section you see the settings of a selected rule.

The window may look as follows:



Top section

This sections offers the following features:

Function	Description
Select a rule	In the bottom section you see the settings of the selected rule.
Rename a rule	After a click on the respective **Edit rule name** icon of a rule, you can rename the rule. **Tip:** You can also rename a rule when you click the name of an already selected rule.
Delete a rule	You delete a rule with a click on the **Delete rule** icon.
Create a new rule	By clicking on the **New** button a new rule is created for an incoming call.
Duplicate a rule	With a click on the **Duplicate** button a new rule is created by duplicating an already existing rule.

Bottom section

For a rule selected in the top section you can perform the following settings in the bottom section:

Function	Description
Specify the priority group	For each rule you can set the priority groups “High”, “Normal” and “Low”.
Set a rule to the highest priority (senator status)	By clicking the **Set the current rule to highest priority and copy to all profiles** icon a rule is set to the highest priority and added to all profiles. **Application example**: You expect a phone call from your garage and you want this call be routed to your cell phone at any rate and any time, no matter which profile is currently active. You thus need not modify each single profile. **Resetting the senator status**: To reset this status you can either delete the rule (Section 3.7.4.1, ““New/edit” Tab”, on page 163) or deactivate the checkbox for each profile in the “Assign profiles to rule:” window (Section 3.7.4.5, ““Assign profiles to rule” Dialog”, on page 173).
Display rule information	With a click on the **Information on** icon the rule information is summarized in a separate dialog.
Specify settings	For each rule you can specify the following settings: – “If call from”, see Section 3.7.4.2, ““If call from” Dialog”, on page 167 – “If date / time”, see Section 3.7.4.3, ““Date/Time” Dialog”, on page 169 – “Action”, see Section 3.7.4.4, ““Action” Dialog”, on page 171 – “Assigned profiles”, see Section 3.7.4.5, ““Assign profiles to rule” Dialog”, on page 173 After clicking the **Edit entry** icon the editing window of the respective setting opens. After clicking the **Reset standard** icon the respective setting is reset to the default value.
Reset modifications	By clicking the **Undo** button the modifications that you have performed are reset.

General features in the "New/edit" tab

This dialog also requires the following feature:

Function	Description
Save all modifications	By clicking the **Close** button the modifications that you have performed in this dialog are saved.

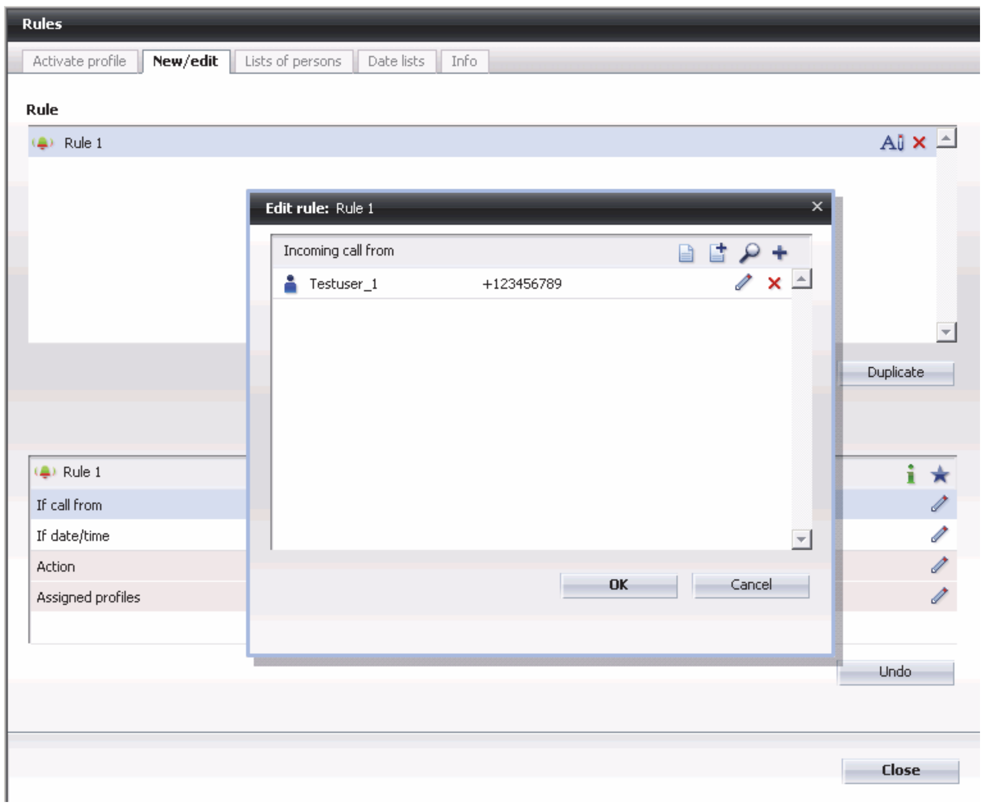
3.7.4.2 “If call from” Dialog

Invoking the dialog

This dialog opens when you access the **New/edit** tab and click in the bottom section of this tab on the **Edit entry** icon for the **If call from** entry.

Overview

The “Incoming call from” dialog displays a list of callers for which the respective rule is to apply. You can select single persons from different lists to add them to the display. The window may look as follows:



Functions

This dialog offers the following features:

Function	Description
Add person from list	After you have clicked the **Add person from list** icon, a window opens in which you can use the “Add from list” combo box to set a list from which you can add a person to the “Incoming call from” display.
Add a list	After you have clicked on the **Add a list** icon, you can look for a list of persons and add it to the “Add from list” combo box.
Find person	After you have clicked the **Find person** icon, you can look for a person and add it to the “Incoming call from” display.
Add person directly	After you have clicked the **New add** icon, an entry dialog opens and you can directly add the name and telephone number respectively e-mail address of an originator to the “Incoming call from” display.
Edit data of a person	After you have clicked the **Edit entry** icon of the respective person, an entry dialog opens and you can change name and phone number.
Delete person	After you have clicked the **Delete entry** icon, the respective person is removed from the “Incoming call from” display.
Select person from a list	How to select a person from a list: – Click on the small triangle of the **Add from list** combo box. – Select a list. The selected list opens. – Activate checkbox of the desired person. – Click the **Add** button. The person is added to the “Incoming mail from” display. See also the “Add a list” feature.
Save all modifications	By clicking the **OK** button the modifications that you have performed in this dialog are saved. Subsequently the window closes.

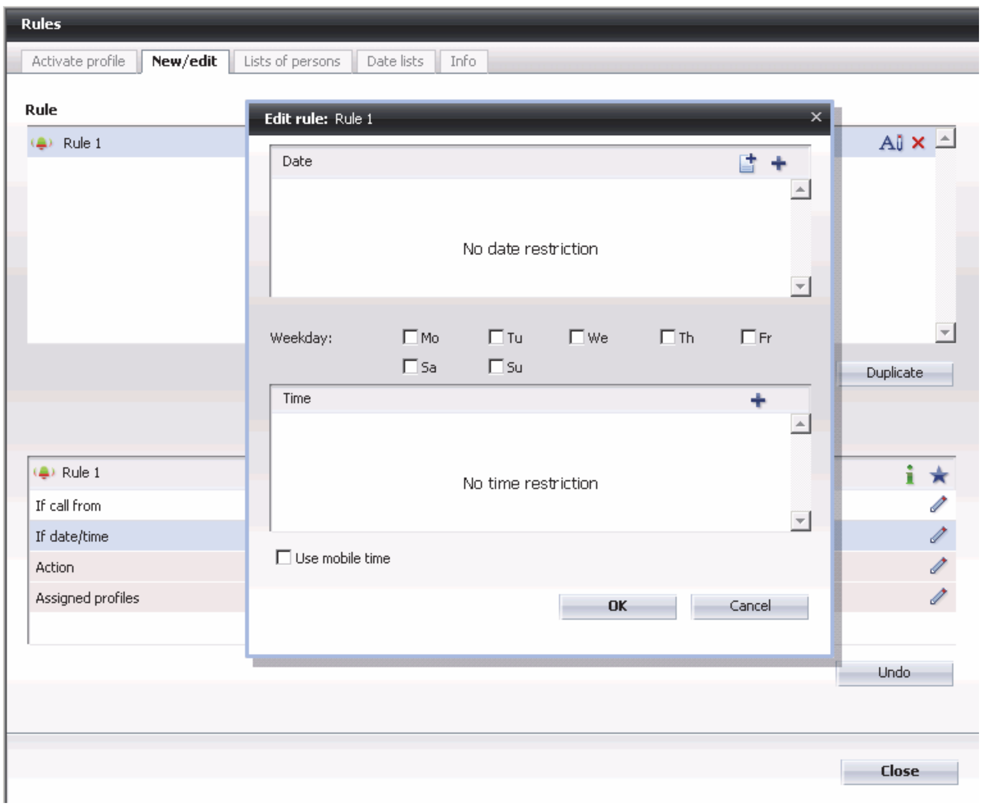
3.7.4.3 “Date/Time” Dialog

Invoking the dialog

This dialog opens when you access the **New/edit** tab and click in the bottom section of this tab on the **Edit entry** icon for the **If date/time** entry.

Overview

In this window you specify for which period, on which weekdays and at which time the rule is to apply. The window may look as follows:



Functions

This dialog offers the following features:

Function	Description
Specify a period	In the “Date” display you see in which period the rule is to apply, e. g. 26 June to 12 August. With a click on the **Add a list** icon you can add an already existing data list to this display, see Section 3.7.4.8, ““Date lists” tab”, on page 179. After you have clicked the **New add** icon of the “Date” display, an entry dialog opens. In this entry dialog you can directly specify the desired period.
Specify weekday	By activating the checkboxes for Mo, Tu, ..., you can specify for which weekdays within the defined period the rule is to apply. Example: The rule applies from 26 June to 12 August, but only from Monday to Friday.
Specify time	In the “Time” display you see at which time the rule is to apply, e. g. . 15:00 to 16:00. Example: The rule applies from 26 June to 12 August, but only from Monday to Friday between 15:00 and 16:00. After you have clicked the **New add** icon of the “Time” display, an entry dialog opens. In this entry dialog you can directly specify the desired time.
Change or delete time	After you have clicked the **Edit entry** icon you can modify the time. With a click on the **Delete** icon the respective time is deleted.
Save all modifications	By clicking the **OK** button the modifications that you have performed in this dialog are saved. Subsequently the window closes.

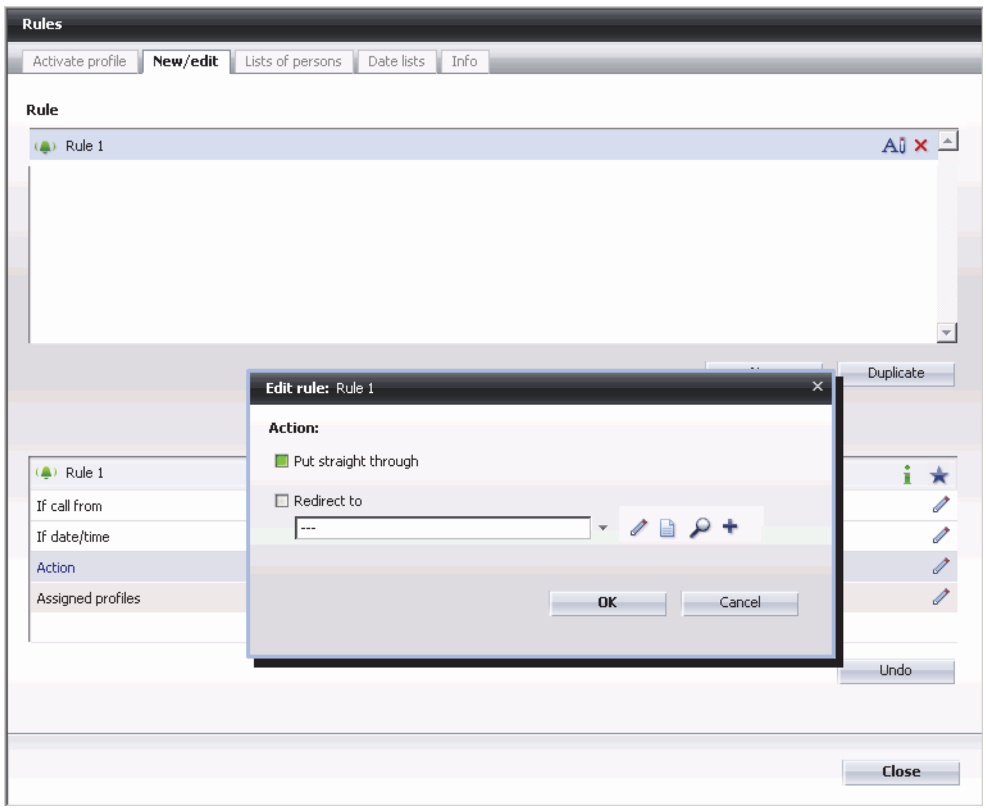
3.7.4.4 “Action” Dialog

Invoking the dialog

This dialog opens when you access the **New/edit** tab and click in the bottom section of this tab on the **Edit entry** icon for the **Action** entry.

Overview

In this window you specify to whom an incoming call is forwarded. The window may look as follows:



Functions

This dialog offers the following features:

Function	Description
Set routing destination for calls	To set a routing destination for a call the following features are available: – Click on the small triangle of the **Redirect to** combo box to open the selection menu. Then select your routing destination. – Click on the **Edit current person** icon to edit the routing destination. – After a click on the **Add person from list** icon, the lists already set are offered for selection. You can add the desired person entry from these lists. – After a click on the **Find person** icon you can look for a person in the available lists. – After you have clicked the **New add** icon, an entry dialog opens and you can directly add the name and phone number of a person.
If possible do not show the redirection to the caller	You can set this option to hide the redirection from the caller.
Save all modifications	By clicking the **OK** button the modifications that you have performed in this dialog are saved. Subsequently the window closes.

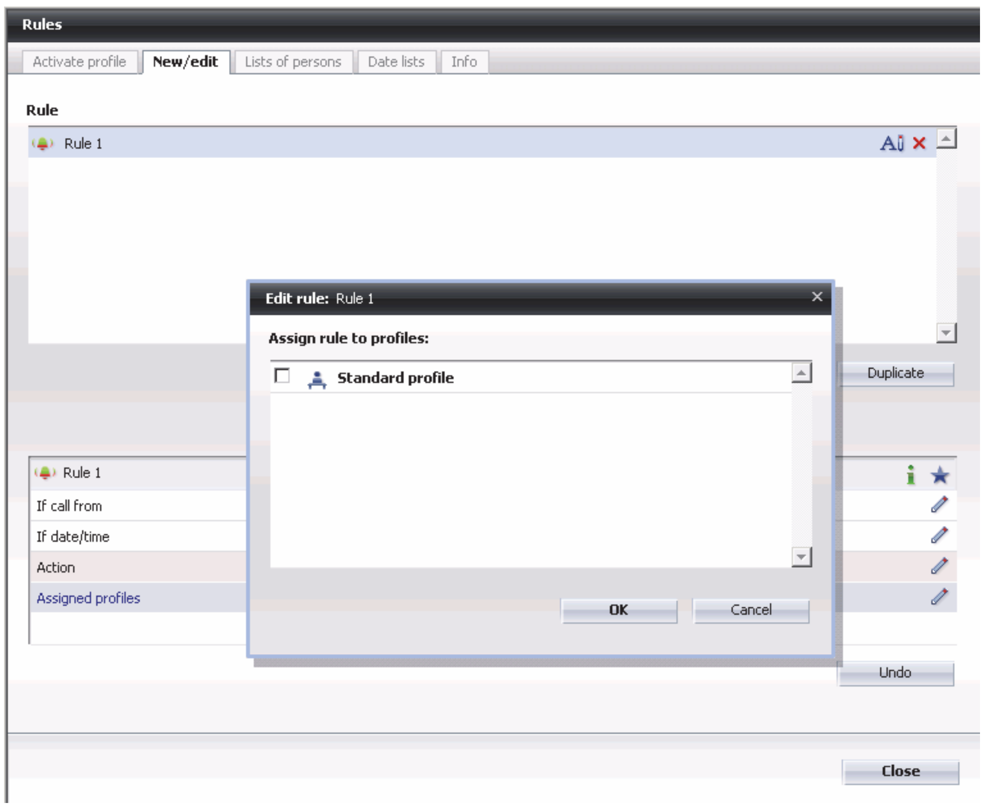
3.7.4.5 "Assign profiles to rule" Dialog

Invoking the dialog

This dialog opens when you access the **New/edit** tab and click in the bottom section of this tab on the **Edit entry** icon for the **Assigned profiles** entry.

Overview

In this dialog you assign the desired profile to a rule that you are currently editing. This makes the rule executable at all. The profile must have been already defined. A profile entered in boldface is currently active. The window may look as follows:



You can also assign several rules to a profile.

Functions

This dialog provides you with the following features:

Function	Description
Assign profile	By activating the checkbox that precedes the desired profile, a profile is assigned to the rule.
Save all modifications	By clicking the **OK** button the modifications that you have performed in this dialog are saved. Subsequently the window closes.
Cancel rule editing	By clicking the **Cancel** button the modifications that you have performed in this dialog are reset.

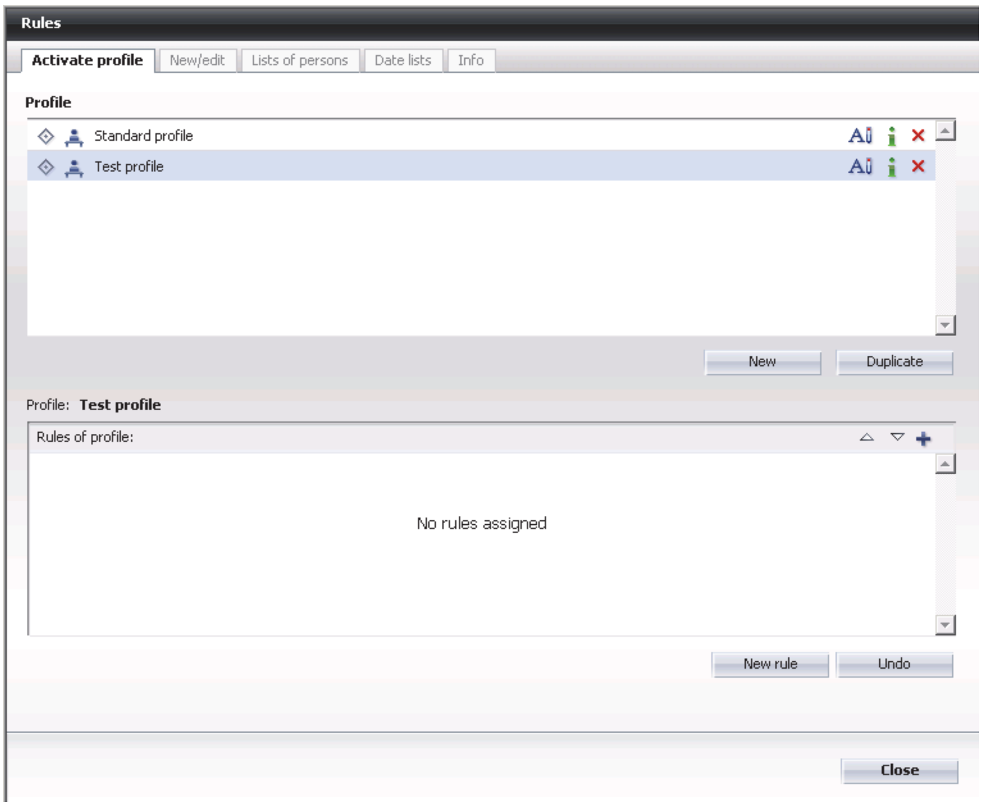
3.7.4.6 “Activate profile” Tab

Invoking the dialog

In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/edit** tab. Switch to the **Activate profile** tab.

Overview

This tab serves for administering the profiles. You can, for example, create new profiles, delete them or modify the priority of single assigned rules. The window may look as follows:



“Profile” display

This dialog offers the following features:

Function	Description
Activate profile	You activate the profile by clicking the checkbox that precedes the profile name. An active profile is indicated by a blue checkbox. When you click the checkbox again, the profile becomes inactive.
Select profile	When you select a profile in the top display “Profile”, the rules assigned to the profile are shown in the bottom display “Rules of profile”.
Rename profile	After you have clicked the **Edit the profile name** icon you can rename the profile.

Function	Description
Display profile information	After you have clicked the **Information on** icon you can see which rules are linked to the profile and what these rules do.
Delete profile	You delete a profile with a click on the **Delete profile** icon.
Create new profile	You create a new profile with a click on the **New** button.
Duplicate profile	With a click on the **Duplicate** button a new profile is created by duplicating an already existing profile.

“Rules of profile:” display

In this display the rules for recognizing the priority groups are indicated as follows: red bell - “High”, yellow bell - “Normal”, green bell - “Low”). The display offers the following features:

Function	Description
Change rule priority	By “moving up”- or “moving down” a rule within the priority group you can change the rule priority and thus the processing sequence: – **Move the selected rule up** icon. – **Move the selected rule down** icon. The rules in the list are processed from top to bottom.
Rename a rule	After you have clicked the **Edit entry** icon you can rename a rule.
Remove rule from profile	With a click on the **Remove rule from profile** icon the rule is removed from the profile. After its removal the rule is still available but not linked to this profile any more.
Reset modifications	With a click on the **Undo** button the performed modifications are reset.

General features on the “Activate profile” tab

This window provides the following features also:

Function	Description
Save all modifications	By clicking the **Close** button the modifications that you have performed in this dialog are saved.

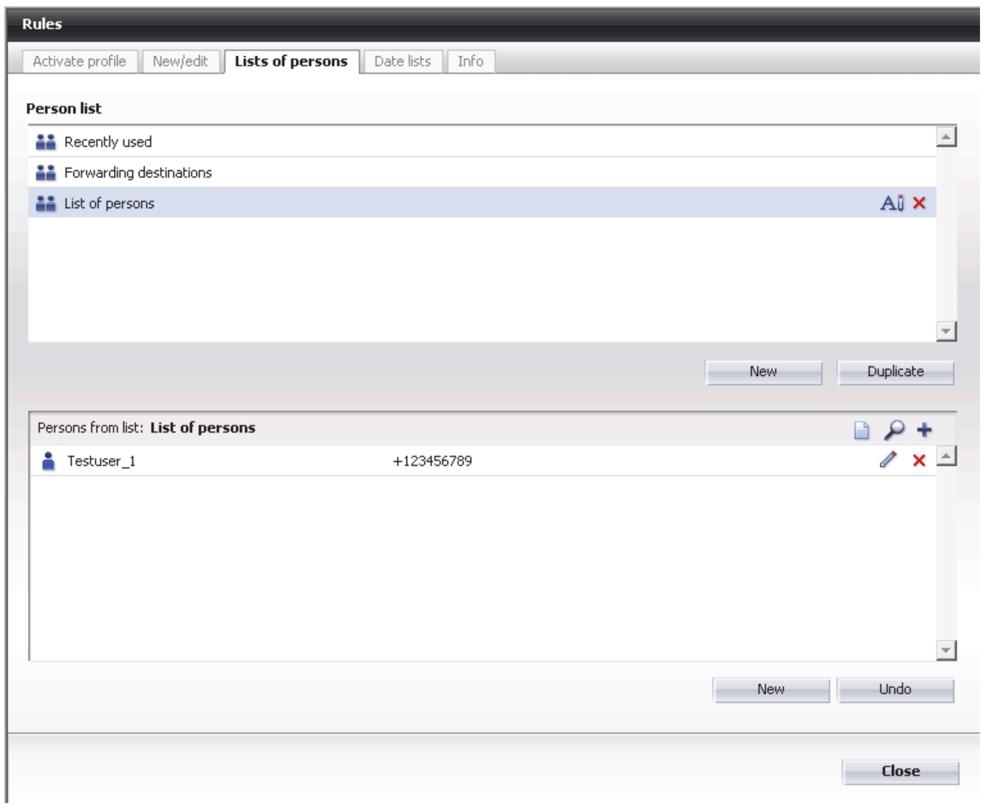
3.7.4.7 "Lists of persons" tab

Invoking the dialog

In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/ edit** tab. Switch to the **Lists of persons** tab.

Overview

This tab serves for administering the lists of persons. You can, for example, create/delete new lists of persons or add single entries to a list of persons/remove them from a list of persons. Via the "If call from" and "Action" options you can link a list of persons to a rule (see Section 3.7.4.1, ""New/edit" Tab", on page 163). The window may look as follows:



"Person list" display

This dialog offers the following features:

Function	Description
Select list of persons	By selecting a list of persons in the top display "Person list" the entries contained in the list of persons are shown in the bottom display "Persons from list".
Rename a list of persons	After you have clicked the **Rename list of persons** icon you can rename a list of persons.

Function	Description
Delete list of persons	You delete a list of persons with a click on the **Delete list of persons** icon.
Create new list of persons	You create a new list of persons with a click on the **New** button.
Duplicate list of persons	With a click on the **Duplicate** button a new list of persons is created by duplicating the selected list of persons.

"Persons from list" display

This dialog offers the following features:

Function	Description
Add person from list	After a click on the **Add person from list** icon, the lists already set are offered for selection. You can add the desired person entry (with phone number and e-mail address) from these lists.
Find person	After you have clicked on the **Search for a person and add him/her to the list** icon you can look for a person entry in the lists already set and add this entry to the list of persons.
Add person entry directly	After you have clicked on the **Enter a new person in the list** icon, an entry dialog opens and you can add a new entry with name, phone number and e-mail address to the list.
Change person entry	After you have clicked on the **Edit entry** icon, you can change the phone number and the e-mail address of an entry.
Delete person entry	With a click on the **Delete entry** icon the entry is removed from the list of persons.
Add person entry directly	After you have clicked on the **New** button an entry dialog opens and you can add a new entry with name, phone number and e-mail address to the list.
Delete previously created list entries	With a click on the **Undo** button you can remove a just added entry from the list again.

General features on the "Lists of persons" tab

This window provides the following features also:

Function	Description
Save all modifications	By clicking the **Close** button the modifications that you have performed in this dialog are saved.

3.7.4.8 “Date lists” tab

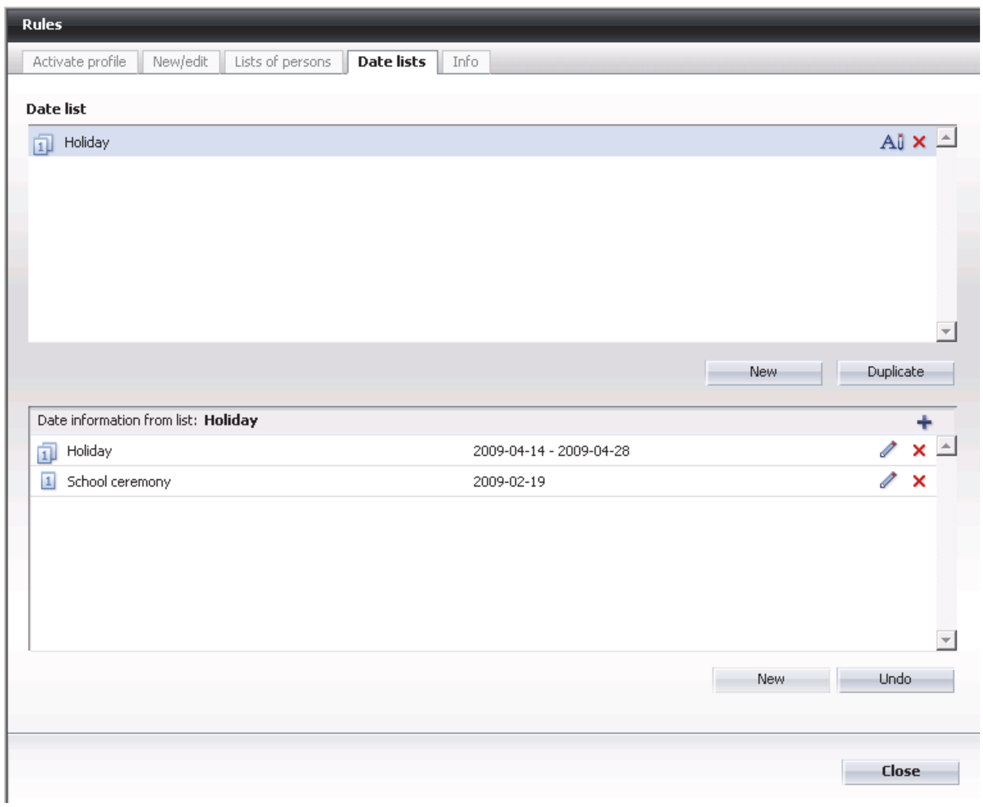
Invoking the dialog

In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/edit** tab. Switch to the **Date lists** tab.

Overview

This tab serves for administering the data lists. In a date list you can specify days and periods in which rule is to apply, e. g. 2008-01-04 to 2008-01-10 or 2008-09-01 to 2008-09-15.

You can link a date list to a rule via the “If date / time” option (see Section 3.7.4.1, ““New/edit” Tab”, on page 163). The window may look as follows:



"Date list" display

This dialog offers the following features:

Function	Description
Select date list	By selecting a date list in the top display "Date list" the date specifications contained in the list are shown in the bottom display "Date information from list".
Rename a date list	After you have clicked the **Rename date list** icon you can rename a date list.
Delete date list	You delete a date list with a click on the **Delete date list** icon.
Create new date list	You create a new date list with a click on the **New** button.
Duplicate date list	With a click on the **Duplicate** button a new date list is created by duplicating an already existing list.

"Date information from list:" display

This dialog offers the following features:

Function	Description
Add date entry directly	After you have clicked the **Enter new date for the list** icon, a window opens in which you can perform data specifications and directly add them to the list.
Change date entry	After you have clicked the **Edit entry** icon you can change an existing date entry.
Delete date entry	With a click on the **Delete entry** icon the entry is removed from the date list.

General features on the "Date lists" tab

This window provides the following features also:

Function	Description
Save all modifications	By clicking the **Close** button the modifications that you have performed in this dialog are saved.

3.7.4.9 “Info” Tab

Invoking the tab

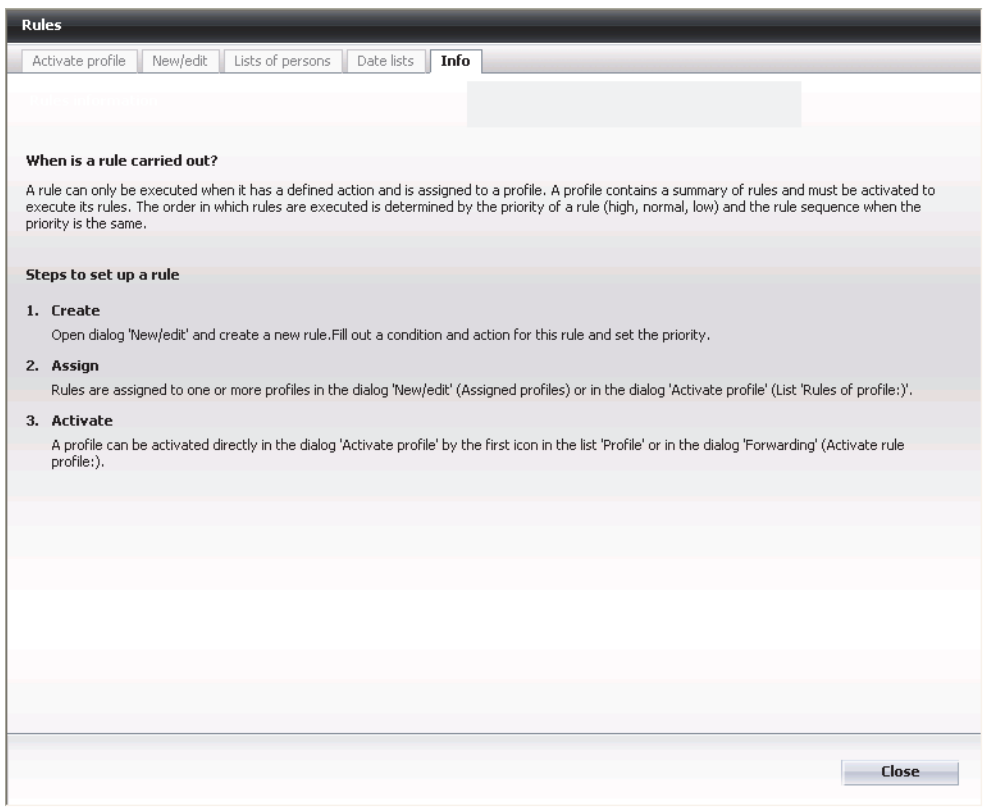
In the main menu select **menu > Rules**. The **Rules** dialog opens with the **New/ edit** tab. Switch to the **Info** tab.

Overview

This tab informs you about the general proceedings for setting rules and profiles and activating them.

You find an overview of the work steps here as well: Section 3.7.1.4, “The most important Rule and Profile Creation Steps”, on page 138.

If you require a detailed description of the work steps, please refer to: Section 3.7.3, “Detailed Work Steps”, on page 150.



General features on the “Info” tab

This window provides the following features:

Function	Description
Close Rules dialog	A click on the **Close** button closes the **Rules** dialog.

3.8 Voicemail Settings (optional)

If you call the **Voicemail...** feature from the **menu**, you can configure the settings for the voice mail system.

After this feature has been called, the dialog **Web Assistant - PhoneMail** opens.

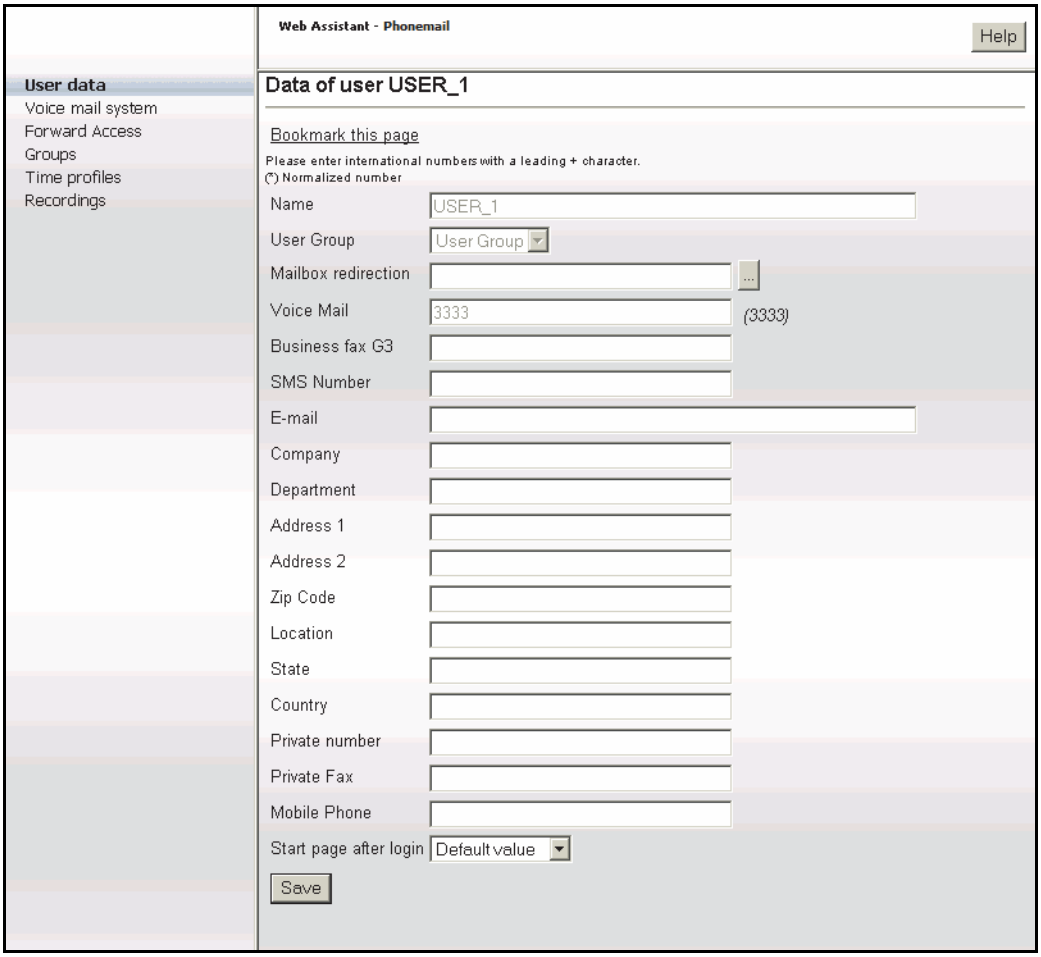
Via the navigation bar at the left hand side you can open the configuration pages for the voice mail system. The following configuration pages are available:

- **User Data**
- **Voicemail System**
- **Forwarding Mode**
- **Groups**
- **Time Profiles**
- **Recordings**

3.8.1 User Data

On the user data page you can see information on your user account.

You open this configuration page via **menu > Voicemail > User data**.



You can modify some of the settings, depending on the system configuration.

- **Mailbox redirection**
  Entry or selection of the mailbox deputy.
  If you are absent for a longer period (vacation, business trip, illness, etc.), you can redirect your mailbox to another user (deputy feature).

NOTE: Messages that have been delivered to your deputy do not appear in you mailbox.

Proceed as follows:

1. Open the configuration page for the user data via **menu > Voicemail > User data**.
2. Click on the button next to the **deputy** field.

   Another window with a list of all users opens.
3. Select a user in this window. Click on the corresponding user ID. The window closes and the selected name will be entered in the Deputy field.

   NOTE: If you know the deputy's user ID, you can enter him/her directly in the **Deputy** field.

   ---

4. Click the **Save** button.

   Remove the name from the **Deputy** field to deactivate the mailbox routing.

- **Your address data**
  You can complete the data mask with your personal address data if you would like to do so. Therefore the following data fields are provided: **Company**, **Department**, **Address 1**, **Address 2**, **Zip Code**, **Location**, **Federal State**, **Country**, **Home Number**, **Home Fax** and **Mobile Phone**. After the completion click the **Save** icon.

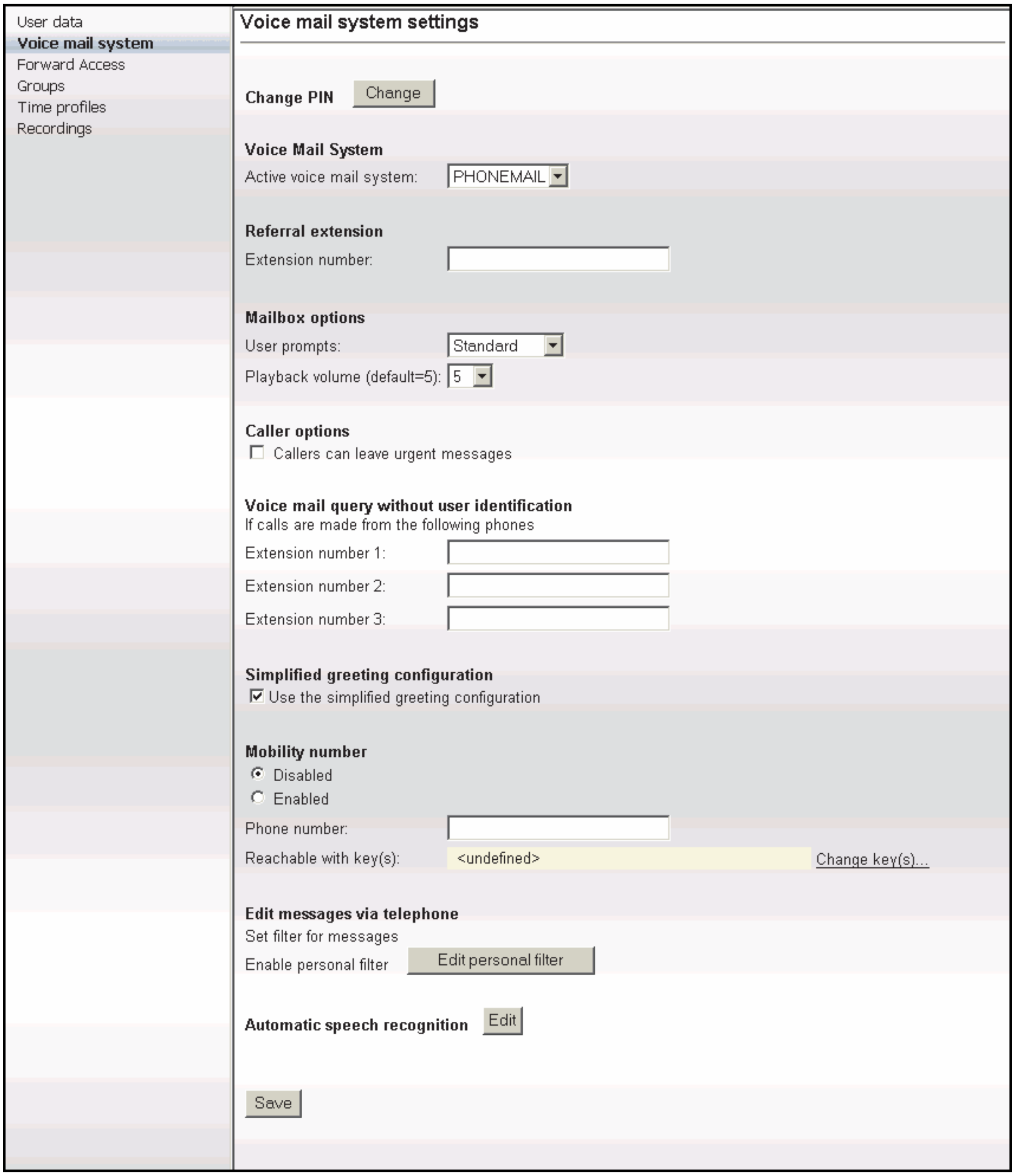
  NOTE: Enter the complete phone number in the fields where you enter phone numbers yourself (e.g. private number).
  Example: +49892221111 (international prefix, area code without heading 0, extension number).

- **Start page after login**
  No function.

3.8.2 Voicemail System

On this page you can make different settings for your personal voice mailbox. Please note that modifications will not become active until you click the **Save** button at the end of the page.

You open this configuration page via **menu > Voicemail > Voice mail system**.



You can perform the following settings on this page:

- **Change PIN**
  You can change your PIN for the voicemail box access. All digits from 0 to 9 can be used. The PIN itself must have at least four digits, unless your configuration differs from the standard one.

  The PIN cannot contain more than twenty-three characters. The PIN is checked for:

  - Length (too short or too long)
  - Invalid characters (letters or special characters),
  - String of a constant number, such as 444444
  - Ascending or descending number string, such as 12345 or 654321
  - Includes the individual telephone or voicemail box number
  - Contains a vanity number
  - PIN was already used at an earlier time
  - PIN is the same as the default PIN

  Changing the PIN

  1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
  2. Click the **Change** button next to **Change PIN**.

     A second window opens.
  3. Enter a new PIN in the **New PIN** field and repeat the entry in the **Confirm new PIN** field.
  4. In the **User password** field enter your current password with which you log on to the *Web Assistant*.
  5. Click the **Save** button.

     The window closes and the new PIN is immediately valid.

- **Voice mail system**
  Since the voice mail system *Phonemail* is not available, selecting another voice mail system is not possible.

- **Referral extension**
  You can enter a direct dialing number to which your calls will be deflected if necessary. The number entered here is used when activating the call forwarding to the referral extension.

  Your deputy may be an *OpenScape Xpressions* user, a user on your PBX, or an external user (you need exchange access to enter an external number for a deputy). If the deputy is an internal user, you can enter the number in short

form (that is, as an extension number) or in long form (for example 32323 or +49 89 722 32323). Otherwise, enter the number in international format. The phone number may not contain more than twenty-two digits.

Enter the number of the desired extension without the CO exit code and prefix 0, but include the country code.

NOTE: Use a personal greeting to notify any callers that they can use the key combination **0 > 7** to connect to the configured referral extension.

- **Mailbox options**
  You can define a detailed or short version of the user prompts of your voicemail box and the relative playback volume.

  – Example of a standard greeting: “Select the star button to correct your entry”.

  – Example of a short greeting: “Correct entry with star”.

  Selecting user prompts

  1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
  2. Click in the combo box and select whether detailed or short user prompts are to be used.
  3. Set the playback volume. The default setting is level 5.
  4. Save your modifications via the **Save** button at the bottom margin of the page.

- **Caller options**
  It is possible to enable callers to mark the message they leave as urgent. If you activate this option, the caller receives another menu after recording his/her message, in which he/she may select the respective option via the telephone.

  Proceed as follows:

  1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
  2. In the section **Caller options** mark the option **Callers can leave urgent messages**.
  3. Save your modifications via the **Save** button at the bottom margin of the page.

- **Voice mail query without user identification**
  You can define three telephones from which you arrive directly at your voicemail box when you call the voice mail system without having to enter your PIN at the system. These so-called trusted numbers simplify your voicemail box access.

IMPORTANT: You should know that trusted numbers might become a security problem. Everybody who knows which extension has been defined as trustworthy and can access this device is in full control of the respective voicemail box. You should never define the telephone at your work station as trustworthy, if other persons have access to your work station.

NOTE: Please also keep in mind that the caller number has to be transmitted to the voice mail system for authentication. This is only possible if the PBX transmits this number. Please contact your PBX administrator if this is not the case.
The numbers defined here must be unique per user. Several users **cannot** configure the same number(s) as trusted number(s).

Proceed as follows:

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Enter one or up to three telephone numbers that you would like to define as trustworthy in the entry fields under **Voice mail query without user identification**. Enter the desired numbers completely with country code but without the leading 0 of the area code and without external line prefix (e.g. +49 2404 123456).
3. Save your modifications via the **Save** button at the bottom margin of the page.

- **Simplified greeting configuration**
  Two time profiles are provided for the voicemail system:

  – The time profile for the simplified greeting configuration that is the default when the *OpenScape Web Client* starts. The simplified greeting configuration allows only using one greeting per greeting type and working day.

  – The time profile for the enhanced greeting configuration. Via this it is possible to configure the greetings of the greeting types for each working day separately.

  How to activate the enhanced greeting configuration:

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Untick the check box **Use simplified greeting configuration**.
3. Save your modifications via the **Save** button at the bottom margin of the page.

- **Mobility number**
  This feature enables you to specify forwardings that the caller can trigger by telephone key entry. Forwarding can be used for both internal and external destinations or to trigger an action, such as switching to another voice mailbox or granting callers callback access (access to their voice mailbox).

  Forwarding can be set up with different variants (actions) with each call forwarded being assigned its own phone key ranging from 0 to 9 as well as * and #. Your voicemail should inform the caller of the appropriate phone key. This must be recorded as a special greeting. If the caller presses the predefined phone key after listening to your greeting, the call is forwarded using the specified action. You can also define various actions for multiple forwarding and make them available to the caller.

  Configured forwarding options and their destination numbers are displayed in the **Phone Number** field. The corresponding phone key is displayed under **Reachable with key(s):**. You can quickly enable or disable existing forwardings via the options **Enabled** or **disabled**.

  The **Forward Mode** page provides a definition of forwarding.

  Configuring a forwarding

  1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
  2. Click the **Change key(s)...**
     link. The configuration page forward mode opens.
  3. Proceed as described in section 3.8.3, “Forward mode”, on page 190.

  After the forward mode has been defined, the page **Voice mail system** shows under mobility number the key number for the forwarding to the mobility number and the destination number.

- **Edit messages via telephone**
  Set personal filters for messages

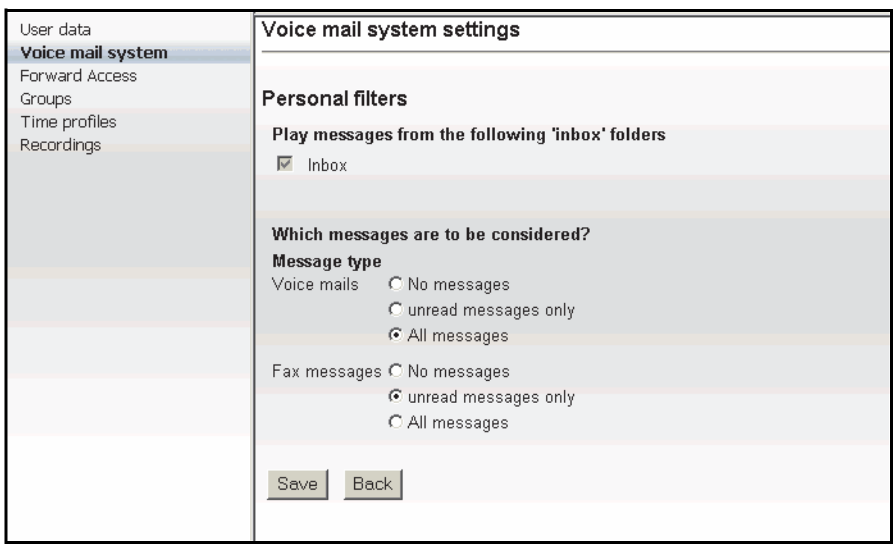
You can set a message playback filter on the telephone so that only specific messages are played upon their retrieval. Messages contained in the server inbox folder are accessed by default.

NOTE: These filters are not applied to read notifications. Read notifications are still issued since they have been explicitly demanded.

Fax or voicemails delivery reports are stored in your voicemail box as e-mail by default. These reports will always be announced, irrespective of the settings for e-mail announcements. This behavior can be changed in the voice mail system, so that the settings made there for e-mails also apply for delivery reports. If you are unsure about this matter, please consult your system administrator.

How to set your personal message filter:

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Click on the **Edit personal filter** button to specify details for the playback filter. A new page opens.



3. Select an **inbox folder** if necessary.
4. Select a filter option under **Message type**. The **No messages** option locks this message type so that it is not considered for playback.

NOTE: Only message types that exist in the system can be selected. The message type **Voicemail** is always available.

---

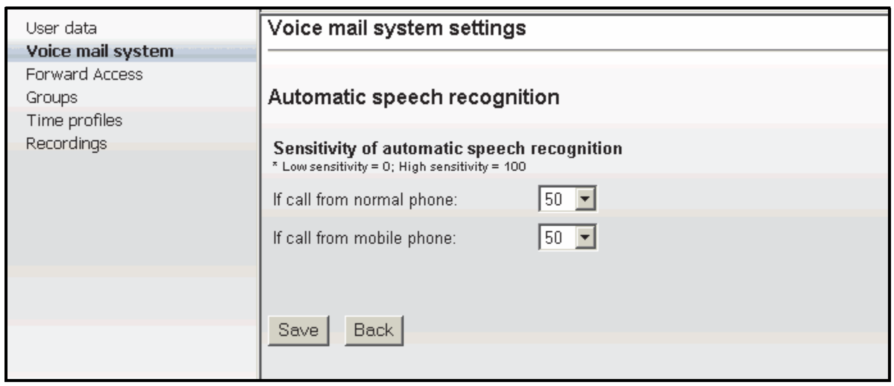
5. Save your modifications via the **Save** button at the bottom margin of the page.

- **Automatic speech recognition**
  On this page you can set the voice recognition sensitivity of the *EVO* voice mail system. Normally, the default values are sufficient.

  Using cell phones the sensitivity may have to be upgraded since cell phone connections are sometimes not free from volume fluctuations.

  How to set the speech recognition volume:

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Click the **Edit** button next to the entry **Automatic speech recognition**. A new page opens.



3. Set the volume here via the two combo boxes, separately for **If call from normal phone** and **If call from mobile phone**.
4. Save your modifications via the **Save** button at the bottom margin of the page.

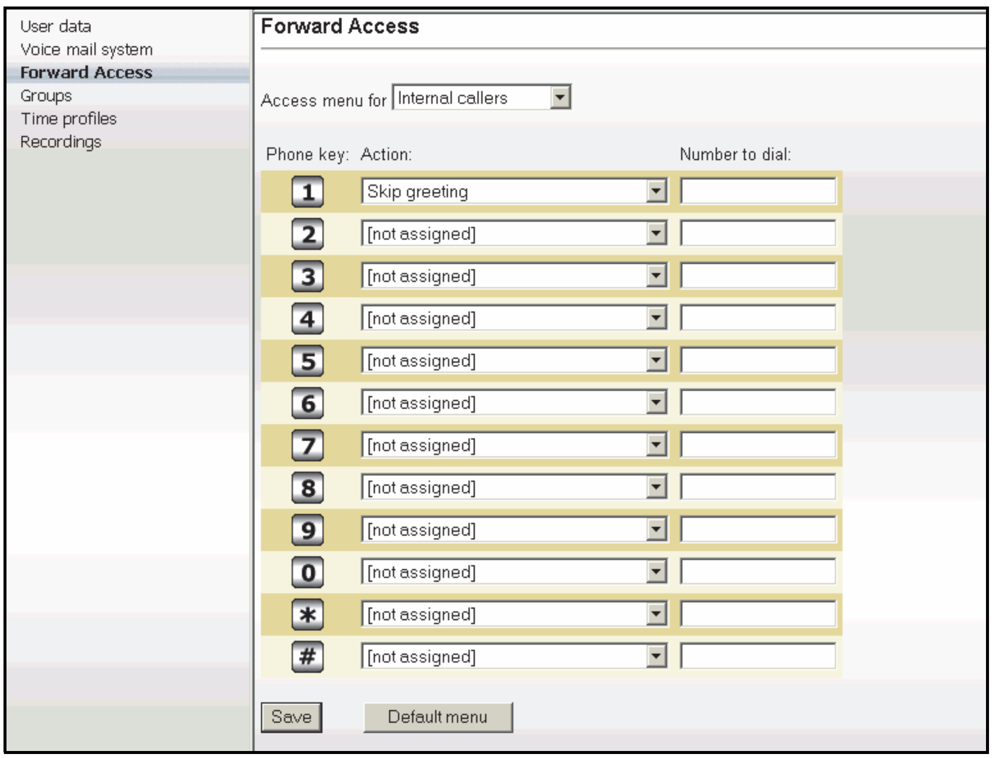
NOTE: Further information on the *EVO* voice mail system is provided in the product's user manual.

3.8.3 Forwarding Mode

Specify the different variants (actions) and phone keys for forwarding on the **Forward Access** page. First of all, you can decide which call type you wish to forward, for example, **Internal calls**, **External calls** or **After-hours greeting**. If you select **Alternate greeting**, all incoming calls will be forwarded. Now determine the forwarding action and the phone key to be pushed by the caller.

NOTE: This menu can always be reached via the Telephone User Interface (TUI), but no options are named by the system. In order to inform the caller about the possible options you need to configure a personal announcement.

You open this configuration page via **menu > Voicemail > Forward Access**.



The table below describes the available actions:

Action	Description
Not assigned	This selection disables the corresponding key number.
Hang up	Disconnects the call if the caller presses the relevant phone key.
Callback access (Callback mode)	Allows the caller to access your mailbox quickly (without having to enter the voicemail box number).
Direct access (Control mode)	Allows the caller to access your mailbox normally
Guest access (Answering machine mode)	Allows leaving a message. The caller has to enter the required mailbox number.
Mobile phone number	Forwards to a preset mobile phone number
Operator	The operator's phone number is configured in the user group, but it may also be configured in the voicemail profile.
Page the user	The caller pages you by pressing the relevant phone key.
Referral extension	Executes a forwarding to a referral extension you have defined.
Skip greeting	Allows the caller to skip the welcome greeting.
Dial the calling number	Allows the forwarding of calls to any telephone number. If the caller pushes the corresponding phone key, the call is immediately connected to the telephone number you have specified here.
Enter phone number, starting with key	Allows the caller to call any extension. Please note that the calling code number is the first number of the extension that can be called. Finish entering the numbers with the # key.

Configuring a forwarding

1. Open the configuration page for the forward access via **menu > Voicemail > Forward Access**.

   NOTE: You can also go to the **Forward Access** via the **Change key(s)...** link from the **Voice mail system** configuration page.

2. In the **Access menu for** list field, select the cases for which forwarding should apply.
3. Select the respective action in the combo boxes. At the same time the respective key number is set.

4. If necessary, enter the desired phone number in the field **Number to dial**.

NOTE: The phone numbers are generally copied from the database. Only for the cases where you have configured a forwarding to a phone number that you have defined freely you need to enter it in the **Number to dial** field.

---

5. Click **Save** to save your settings.

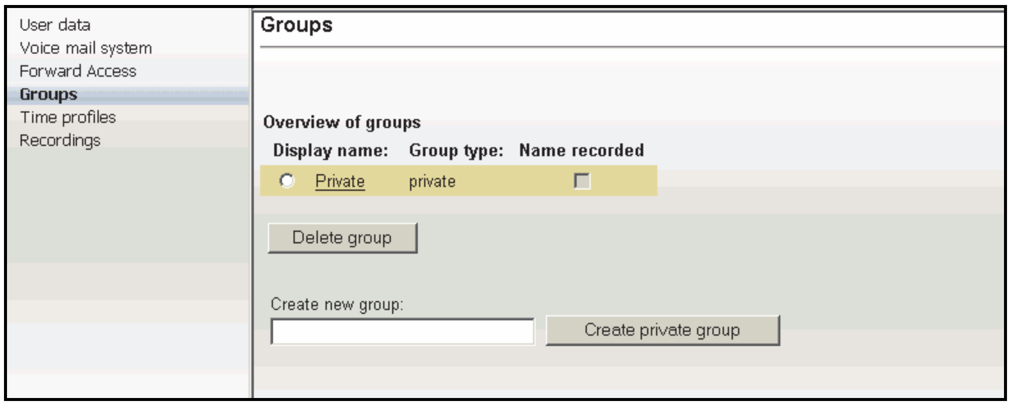
NOTE: Be sure to inform callers of these individual phone key(s) with appropriate greetings.

The **Default menu** button resets the menu to its original appearance. Modifications performed are deleted then.

3.8.4 Groups

You can quickly and comfortably create and administrate groups to sum up certain contacts. You can then send messages to all group members by using the group name for addressing. A maximum of 10 groups can be defined. You can select the groups created here also in the address book as distribution lists.

You open this configuration page via **menu > Voicemail > Groups**.



If a name has been recorded for the group, the **Name recorded** column features a tick in the corresponding box.

3.8.4.1 Creating a new private Group

How to create a new private group:

1. Open the configuration page for the groups via **menu > Voicemail > Groups**.
2. Enter the desired group name in the **Create new group** field.
3. Click the **Create private group** button.

   The new group will be created and displayed.

The newly created private group is still empty. You may now create further groups or edit the new group, i.e. add members and define additional details.

3.8.4.2 Editing a private Group

How to edit a private group:

1. Open the configuration page for the groups via **menu > Voicemail > Groups**.
2. Click on the name of the group that you want to edit. A new page opens where you can realize the steps.

NOTE: If you select a group for which have no privilege, only the current settings are displayed, however, you may not carry out modifications. The Save... buttons and the group of the available users and groups are hidden.

---

3. If necessary, change the group name in the **Display name** field. You can also use blanks and special characters here. To conclude this operation, click the **Save name** button.
4. Select a message type from the combo box **Alternate group name** and enter a group address. Here you may decide if you would like to use an Internet mail address (*dispatcher@company.com*) or a so-called NVS address (e.g. *NVS:VOICE/12345*) as group address. If you would like to have messages to the group also displayed via the Telephone User Interface (TUI), you need to enter the following string: *NVS:VOICE/<Phone Number>*. Click the **Save alternate group name** button.
5. Features also available on this page:
   - Admitting users to a group
   - Removing users from a group
   - Recording a group name

   These features will be described in the following sections.

Admitting users to a group

The **Available users** list shows all users registered in the system. The **Available groups** list shows all groups already created.

You can select single users or existing groups as members of your group. The lists show only 50 entries at once for selection, and only a subset of them is visible in the **Available users** group. Move down with the vertical scroll bar to view also the other entries.

Proceed as follows:

1. Select **Sort by** in the combo box or another mode for sorting lists and click the **Sort** button to refresh the sorted list.
2. Click **Show next** so that the next 50 entries of the user list are displayed.

3. Click the **First** button to reload the first 50 entries.
4. If you are looking for a particular name, enter the name in the **Search user** field and click **Search**.
5. To mark a user desired for the group, simply click this user in the **Available users** list.
6. Click the **<<** button to insert the marked user in the group.
7. Proceed similarly for **Available groups** to add groups to the group if desired.
8. Apply the same procedure for inserting more users or groups.
9. Click an entry in the **Members** list followed by the **>>** button to remove this entry from the list.
10. If required, select other external addresses for the group (e.g. e-mail addresses) under **Alternate addresses** and click the **<<** button to add these to the group.
11. Then click the **Back** button to return to the Groups page.

Removing users from the group

You can remove users from a group any time.

1. Click on the entry in the members list that you want to remove.
2. Keep the `<Ctrl>` key pressed to select several entries at the same time if required.
3. Click the **>>** button to remove the selected entries from the list.

Recording a group name

How to record a group name:

1. Click the **Recording** link next to **Record group name**. The **Recordings** dialog opens.
2. Enter the number of the telephone from which you want to record the group name. Afterwards, click on **OK**.
3. Click on **Recording** and record the desired name.
4. Click on **Exit** to end the recording.
5. Click on **Save** to save the recorded group name.

As soon as you have recorded the group name the **Recording** link next to **Record group name** is not displayed any longer.

NOTE: The group name recording procedure is identical with the recording procedure. See Section 3.8.6, “Recordings”, on page 207.

3.8.4.3 Deleting a Group

You can delete a personal group that you have created yourself at all times.

Public groups can only be deleted by a user with the **Global Distribution List Editor** privilege or by the administrator.

1. Open the configuration page for the groups via **menu > Voicemail > Groups**.
2. Click the option field that precedes the desired group to select it.
3. Click the **Delete group** button. A security check will appear.
4. Confirm the security check. The selected group is deleted.

3.8.5 Time Profiles

With the help of time profiles you can define when and with which greetings your mailbox should react to incoming calls.

NOTE: The greetings that can be integrated in the time profile of this dialog must first be created via the Recordings feature. See Section 3.8.6, “Recordings”, on page 207.

Two time profiles are available:

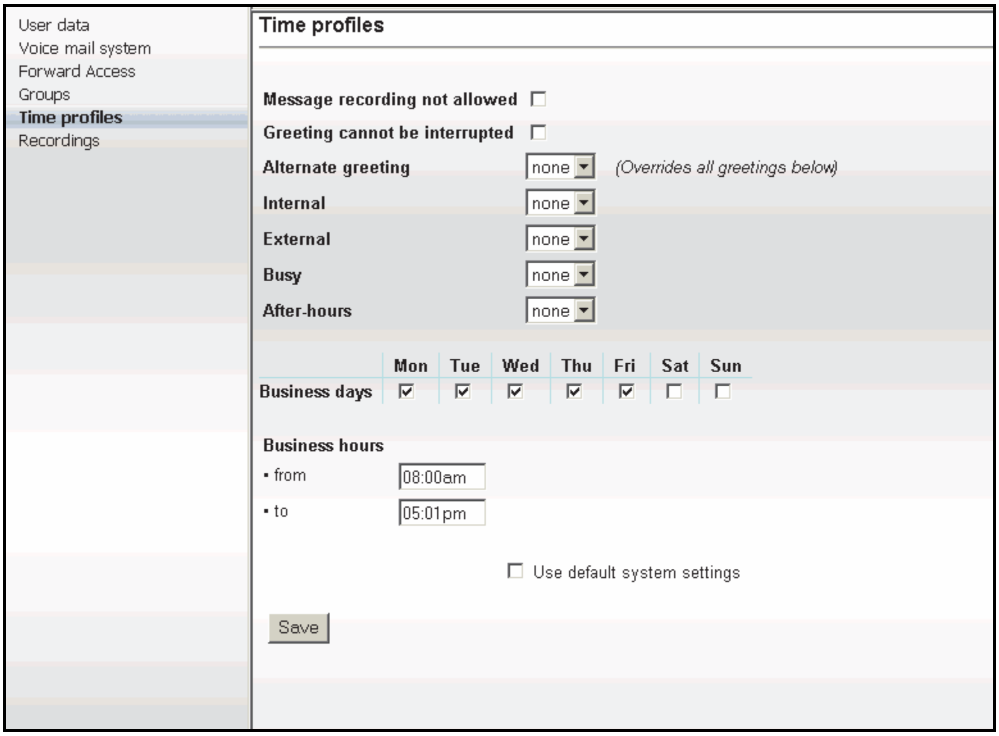
- The time profile for the simplified greeting configuration that is the default when the *OpenScape Web Client* starts. The simplified greeting configuration allows only using one greeting per greeting type and working day.
- The time profile for the enhanced greeting configuration. Via this it is possible to configure the greetings of the greeting types for each working day separately.

Proceed as follows to switch from a simplified greeting configuration to the enhanced greeting configuration.

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Untick the check box **Use simplified greeting configuration**.
3. Save your modifications via the **Save** button at the bottom margin of the page.

3.8.5.1 Creating the Time Profile for the simplified Greeting Configuration

In the simplified greeting configuration you can globally specify the greetings to be used only once. These settings then apply for all weekdays for which you have released the greetings.



You can configure the following settings for the simplified greeting configuration:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played for the caller. He/she cannot leave a message in your mailbox.

- **Greeting cannot be interrupted**
  If this option is activated, it is not possible to interrupt a greeting by clicking a telephone key. You cannot use the telephone keys until the system has played the entire greeting.

  The only exception is the configured confirmation key (for instance * or #) that can be used at all times. If the configured confirmation key was ignored, it would not be possible to connect to your own voice mailbox.

- **Greetings**
  For each call type, for an alternative greeting, for calls outside business hours and for each weekday you can choose one of the following options:

- **none**
  If you select **none** for the greetings, a standard system greeting will be used.
- **Personal greetings**
  Personal greetings are only marked with a number in the list. You can only select the personal greetings that you have previously recorded on the configuration page **Personal settings > Recordings**.
- **Default user greetings**
  Default user greetings are marked with a number and a star in the list. Only those standard user greetings are available that a user with administrator privileges has previously recorded on the **Recordings** configuration page as standard user greeting.

In the **Greetings** section you can enter personal greetings for different call types:

- **Alternate greeting**
  An alternate greeting is played irrespectively of the call type (internal, external, busy). As soon as you record and activate this greeting, all incoming calls will be answered with it. This setting disables any other greetings you may have set for internal calls, external calls, calls with engaged line or outside business hours.
- **Internal Callers**
  Select the greetings that should be played if the received call is an internal one (e.g. within your company).
- **External Callers**
  Select the greetings that should be played if the received call is an external one (e.g. a call from the public telephone network).
- **Busy**
  Select the greeting that should be played if your telephone is busy when a call is received.
- **After-hours greeting**
  Select the greeting that should be played if a call is received outside the set business hours.

- **Business days**
  By activating the appropriate Business days checkbox you determine for which weekdays the selected greetings are to be played.
- **Business hours**
  You can enter a time range for business hours in the **from** and **to** input fields. Enter the times in hours and minutes (syntax: HH:MM). Outside the period specified here the greeting you have set under **After-hours** or a default greeting of the system is used.

  Click **Save** to save your settings.

Creating a time profile for the simplified greeting configuration

How to create a time profile for the simplified greeting configuration:

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Tick the check box **Use simplified greeting configuration**.
3. Save your modifications via the **Save** button at the bottom margin of the page **Voice mail system**..
4. Then open the configuration page for the time profile by clicking on **Time profiles** in the navigation section.
5. Set whether a message recording should be allowed. Activate or deactivate the option **Message recording not allowed**.
6. Set whether the caller may interrupt the greeting. Activate or deactivate the option **Greeting cannot be interrupted**.
7. Set the greetings for the single call types. In the corresponding combo boxes select a greeting for each call type. If you do not select a greeting for a call type, the default system greeting is used for this call type.
8. Select the business days for which the greetings are to become effective.
9. Set the business hours.
10. Via the **Use default system settings** checkbox you can copy the system default settings.

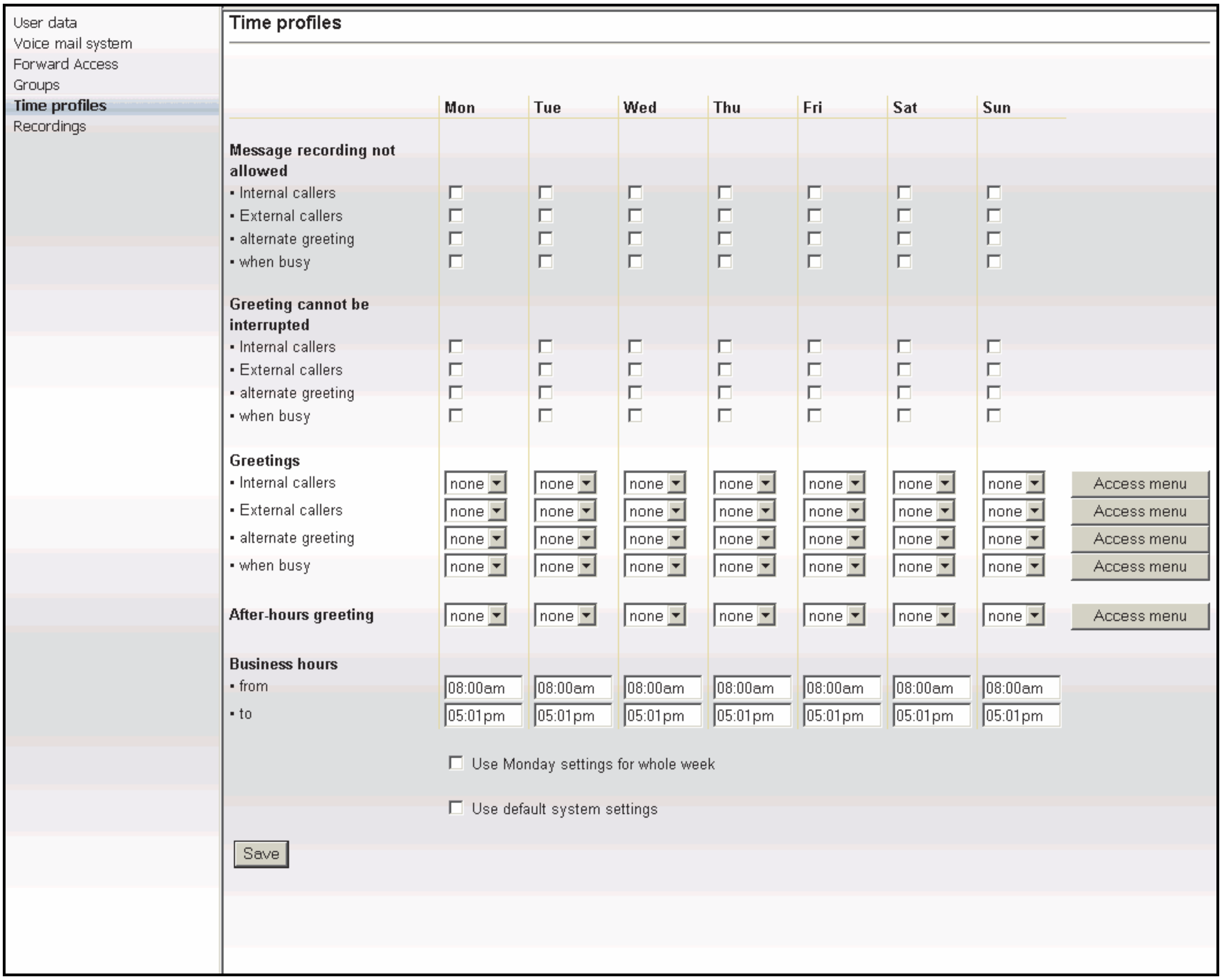
    NOTE: If you select this option, all other selection and setting options on this page become inactive.

11. Click the **Save** button.

Creating a time profile for the simplified greeting configuration is now completed.

3.8.5.2 The Time Profile for the enhanced Greeting Configuration

The advanced time-profile allows making individual settings for each weekday.



You can create an individual time profile for each weekday by assigning the settings to the corresponding greetings in a column each, respectively by selecting the corresponding greeting options.

You can select the following options and greeting settings:

- **Message recording not allowed**
  If this option is activated, only a greeting text is played for the caller. He/she cannot leave a message in your mailbox.

- **Greeting cannot be interrupted**
  If this option is activated, it is not possible to interrupt a greeting by clicking a telephone key. You cannot use the telephone keys until the system has played the entire greeting.

  The only exception is the configured confirmation key (for instance * or #) that can be used at all times. If the configured confirmation key was ignored, it would not be possible to connect to your own voice mailbox.

- **Greetings**
  For each call type, for an alternative greeting, for calls outside business hours and for each weekday you can choose one of the following options:

  – **none**
  If you select **none** for the greetings, a standard system greeting will be used.

  – **Personal greetings**
  Personal greetings are only marked with a number in the list. You can only select the personal greetings that you have previously recorded on the configuration page **Personal settings > Recordings**.

  – **Default user greetings**
  Default user greetings are marked with a number and a star in the list. Only those standard user greetings are available that a user with administrator privileges has previously recorded on the **Recordings** configuration page as standard user greeting.

  In the **Greetings** section you can enter personal greetings for different call types:

  - **Alternate greeting**
    An alternate greeting is played irrespectively of the call type (internal, external, busy). As soon as you record and activate this greeting, all incoming calls will be answered with it. This setting disables any other greetings you may have set for internal calls, external calls, calls with engaged line or outside business hours.

  - **Internal callers**
    Select the greeting that should be played if the received call is an internal one (e.g. within your company).

  - **External callers**
    Select the greetings that should be played if the received call is an external one (e.g. a call from the public telephone network).

  - **when busy**
    Select the greeting that should be played if your telephone is busy when a call is received.

  - **After-hours greeting**
    Select the greeting that should be played if a call is received outside the set business hours.

- The **Access menu** button
  You can configure a separate forwarding mode for each of the call types **Internal callers** and **External callers** as well as for the greeting types **alternate greeting**, **when busy** and **After-hours greeting**.

  Via the **Access menu** button you directly reach the dialog for setting the forwarding mode. You find more information about the forwarding mode in Section 3.8.3, “Forwarding Mode”, on page 192

- **Business days**
  By activating the appropriate Business days checkbox you determine for which weekdays the selected greetings are to be played.

- **Business hours**
  You can enter a time range for business hours in the **from** and **to** input fields. Enter the times in hours and minutes (syntax: HH:MM). Outside the period specified here the greeting you have set under **After-hours** or a default greeting of the system is used.

- **Additional settings**
  Via the option **Use Monday settings for whole week** option you can copy the settings made for Monday to all weekdays and thus simplify the configuration.

  Via the **Use default system settings** option you can copy the settings that the administrator has globally made for the system as standard user profile. When you select this option, all other selections and settings in the Time profiles dialog are disabled.

  Click **Save** to save your settings.

Creating a time profile for the enhanced greeting configuration

How to create a time profile for the enhanced greeting configuration:

1. Open the configuration page for the voice mail system via **menu > Voicemail > Voice mail system**.
2. Untick in the check box **Use simplified greeting configuration**.
3. Save your modifications via the **Save** button at the bottom margin of the page **Voice mail system**..
4. Then open the configuration page for the time profile by clicking on **Time profiles** in the navigation section.
5. Set here whether a message recording should be allowed. Activate or deactivate the option **Message recording not allowed**.

6. Set whether the caller may interrupt the greeting. Activate or deactivate the option **Greeting cannot be interrupted**.
7. Set the greetings for the single call types. In the corresponding combo boxes select a greeting for each call type. If you do not select a greeting for a call type, the default system greeting is used for this call type.
8. Set the business hours.
9. Via the **Use Monday settings for whole week** checkbox you can transfer the Monday settings to all other days. If you do not select this option, you need to perform the steps 5 to 8 for each weekday.
10. Via the **Use default system settings** checkbox you can copy the system default settings.

NOTE: If you select this option, all other selection and setting options on this page become inactive.

---

11. Click the **Save** button.

Creating an advanced time-profile is complete.

3.8.6 Recordings

On the configuration page **Recordings** the recordings that are available for the user are displayed. These recordings are assigned to the different call types via the time profiles.

Different user types are provided with different recording types:

- **Standard user**
  - Welcome greeting
    Recordings of this type are only displayed if they have been created by an administrator or company.
  - Standard user greeting
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - Public group
    Recordings of this type are only displayed if they have been created by an administrator. An administrator can only create greetings of this type if a public group has been previously generated. See Section 3.8.4, “Groups”, on page 195.
  - Private group
    Recordings of this type are only displayed if they have been created by the user. Greetings of this type can only be created if a private group has been previously generated. See Section 3.8.4, “Groups”, on page 195.
  - Personal name recording
    Recordings of this type are only displayed if they have been created by the user.
  - Personal greeting
    Recordings of this type are only displayed if they have been created by the user.
- **Company**
  - Welcome greeting
    Recordings of this type are only displayed if they have been created by an administrator or company.
- **System**
  - Standard user greeting
    Recordings of this type are only displayed if they have been created by an administrator or system.
  - No recording of type “Private group” is displayed, even if the user has made such a recording.
- **Administrator**

– An administrator may use advanced recording options.

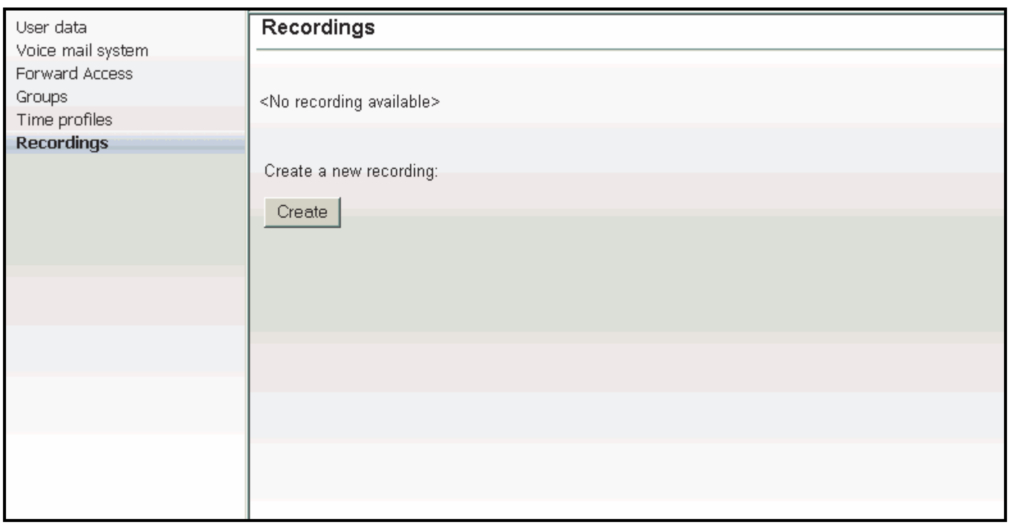
You can use any terminal device for your recording.

NOTE: If your administrator has created and configured global greetings (company greetings), they will be replaced by your personal greeting.

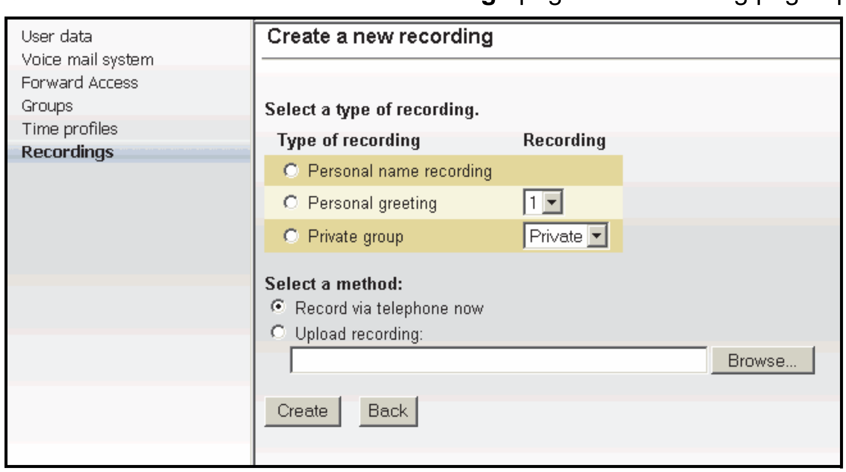
3.8.6.1 Recording and editing Greetings

You can save 9 private greetings and one name recording. The recording type **Private group** is only visible when you have created a private group. See Section 3.8.4, “Groups”, on page 195.

1. Open the configuration page for the voice mail system via **menu > Voicemail > Recordings**.



2. Click the **Create** button on the **Recordings** page. The following page opens:



3. Select the desired recording type in the column under **Type of recording** via the respective radio button in front of the entry.
4. In the **Recording** column select the details. In case of a standard user greeting or a personal greeting this is a digit. In case of a private or public group this is the group name. Based on this digit respectively name a recording may be selected, for example, in a time profile.
5. In the **Select a method** section you decide whether you want to make your recordings via telephone or use an already existing file from your file system. Proceed as follows:

   Recording a greeting via telephone:

   1. Under **Select a method** activate the option **Record via telephone now** and click on the **Create** button.
   2. In the ensuing dialog, enter the number of the telephone with which you want to record the greeting and click on the **OK** button.
   3. Your phone rings and you can start your recording. Click on the **Record** button to start the recording. You control the record and play features with the buttons that are now displayed in the browser window. You can record greetings, listen to them and delete them.
   4. Click the **Pause** button to interrupt the recording. The current length of recording will be displayed.
   5. Click the left end of the position bar to rewind to the start of the recording.
   6. Click the **Play** button to play back the recording and listen to your recording via the telephone handset.
   7. If you are satisfied with your recording, click the **Exit** button. The recording is saved and the Recordings page reappears.
   8. If you would like to repeat the recording, click the left end of the positioning bar to rewind to the start of the recording and then click the **Recordings** button to restart the recording.

   NOTE: If you have selected the **Auto refresh** option, the cursor will always be set to the beginning of the input box by the repeated download of the page. This complicates the input. Disable this option before using the input field as described in step 9.

   9. Enter a number in the input field beneath the buttons and click the **Go to position:** button to move to a specific position in the recording. The current position is displayed in seconds via the buttons and on the positioning bar.

   Uploading an existing file

1. Activate the **Upload recording** check box under **Select a method**. Enter the path and file name of the prepared WAV file in the text field or find the desired file in the file system via the **Browse...** button.
2. Use the file selection dialog to navigate to the directory of the desired file.

NOTE: Verify that **All Files (*.*)** is default set as file type in the file selection dialog.

---

3. Select the desired WAV file.
4. Click the **Open** button in the file selection dialog.
   The path and the selected file are copied to the entry line.
5. Click **Create**.

3.8.6.2 Deleting Greetings

NOTE: A greeting that is currently used in a time profile cannot be deleted. Before you delete a greeting, check whether this greeting is used in a time profile.. See Section 3.8.5, “Time Profiles”, on page 199.

---

1. In the recording list select the greeting that you would like to delete by clicking the radio button in front of the entry.
2. Click Delete recording. You are prompted to confirm the deletion.

Click on **OK**. The selected greeting is deleted and you see the Recordings page again.

Index